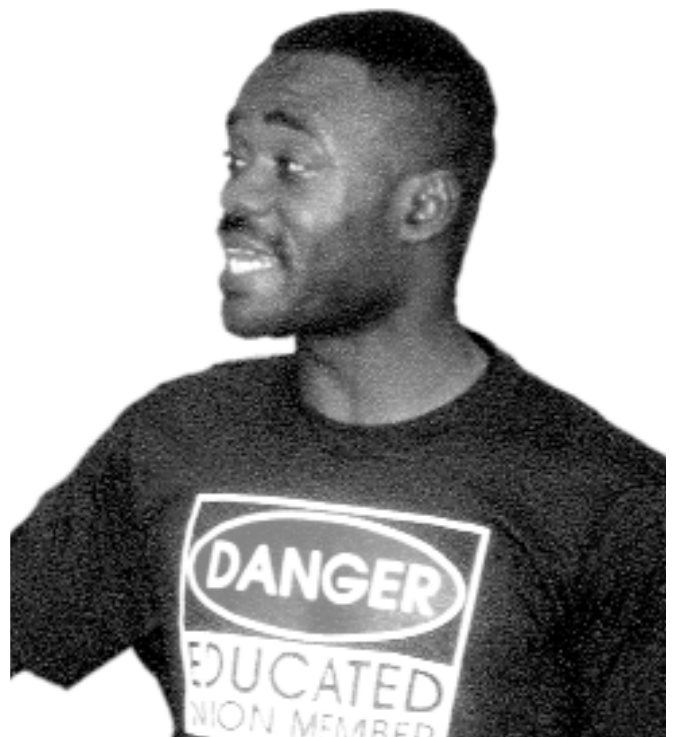




International Metalworkers' Federation

Education Reflection Action

An IMF manual for union educators and activists





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To the Reader

Educating their members is a fundamental task for all trade unions. Without knowledge and skills the unions cannot survive. The IMF Action Programme for 2002-2005 states that “The IMF will work with affiliates to build the skills and resources ... by providing training and materials ...” I wish that IMF affiliates will find the manual useful in their own educational activities. An Internet version is to be found at the IMF webpage www.imfmetal.org

Marcello Malentacchi
General Secretary

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The two exercise on making group work more effective in part four of the manual have been reprinted with the permission of Beth Marr, Lecturer in Adult Education at RMT, Melbourne.

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Introduction

The IMF Educators' Manual

This IMF manual has been produced to assist educators in IMF affiliated unions to develop and improve their trade union education programmes. The manual gives an overview of active learning and adult education. It also addresses basic questions such as:

- What is trade union education?
- Why do unions need it?
- How do we carry out trade union education programmes and workshops effectively?
- How do we evaluate the effectiveness of our programmes?
- How can trade union education be used to meet some of the new challenges unions face in the 21st century?

Who is this manual for?

This book has been written for people involved in union education. You may be involved in union education in a number of different ways.

- **Education Officer.** You may be an education officer who carries out educational activities on a full time or part time basis.
- **Study Circle Leader.** You may be a union activist who has become a study circle leader and you want to know more about union education.
- **Union Organiser.** You may be a union organiser or official who wants to use educational activities to liven up meetings and improve people's skills and involvement.
- **Union Steward/Rep.** You may be a union rep who wishes to use educational sessions with your members.

Whatever your involvement in union education, this manual will help you plan and carry out your educational activities. We hope you will find it a useful resource in workshops and study circles and also in union meetings and activities.

Aims of the Manual

The aims of the manual are to help you:

- think about what union education is for and your role as an educator
- learn to use active learning methods which encourage involvement and action
- improve your skills and effectiveness as an educator



- plan and run individual sessions, course and workshops
- learn how to evaluate courses and encourage the link between education and action
- organise your own educational methods courses for educators and study circle leaders
- improve your education programmes by looking at best practice models from other unions.

How to use this manual

This manual has been written so it can be used:

- **as a guide or companion for educators involved in any aspect of trade union education. You can use it on its own or together with your own material**
- **as a basic resource tool for you to use when you are planning and organising educational course, workshops or study circles**
- **as a course book for training educators and study circle leaders**

As a Companion

If you are a union educator, then you have a challenging role to perform. You may be supported by other union staff, but may often be working on your own. This manual can provide advice and support when this is not readily available. It may help remind you of the ideas and skills you picked up during your training or help you if you have a particular problem with a course or study circle. You may also use the manual as a self teaching tool and you will find activities in it that will help you use it this way. We suggest you think of the manual as a companion you can turn to when you need assistance and guidance.

As a Resource

When you are planning any kind of educational activity you will need resources. This manual aims to give you some of the basic resources you will need. It includes model activities, planning tools, checklists and advice on how to put a session or course together. It provides advice on how to evaluate your educational activities. It will also be a useful tool if you wish to discuss your educational approach with other educators. A dialogue with other educators and study circle leaders is essential if you wish to improve your education sessions and courses.

Training Educators

The manual has also been designed to help train educators or “train trainers” as it is sometimes called. One important way your union can encourage self-reliance in trade union education is to train your own officials and activists to become union educators. Throughout the manual you will find small group and whole group activities that can be used to form the basis of a course to train your own educators. You will find some suggested outlines for these courses and other advice in a tutor guide that has been written to accompany the manual.

At the end of each part of the manual you will also find some self- learning exercises to help you if you are using the manual to learn by yourself.

PART ONE

Adult Education and Union Education

Introduction

In this first part of the manual we look at some of the main ideas in adult education and the development of active learning. We will consider such questions as

- How is adult education different?
- What are the main characteristics of the adult learner?
- What positive and negative aspects do adult learners bring with them?
- What are the implications of this for the adult educator?
- What are some of the key ideas or principles involved in the teaching and learning of adults?
- How do these key principles relate to union values and beliefs?



At the end of this section of the manual there are three case studies. Two case studies give examples of specific approaches to adult education involving the union movement in America and Sweden. The final case study is based on the ideas of Paulo Freire and popular education. These case studies highlight that many of the ideas concerning adult education have been forged from educators working with unions and working with communities of the poor or disenfranchised.

How is adult education different?

One of the first questions to be asked about adult education is whether it is different from education in schools. To explore this question we need to look at the main characteristics of the adult learner you will be working with as a union educator. Some of the main characteristics of adult learners are:

An adult with experience of life. All adults have an experience of life and in this way are different from school students. This experience of life will often be their starting point in looking at new information and ideas.

A need to be respected. Nearly all adults have a need to be respected as an individual. The same may apply to school students, but this need for respect will be more developed in mature adults.

Someone who is keen to learn. You will find that most adult participants are active and keen to learn. They will see an educational course or workshop as an opportunity to learn along with other adults. Working people may have limited opportunities to attend educational workshops and activities and will usually value the experience.

A person with expectations. Participants will arrive at an educational course or workshop with expectations about what they will learn and what benefit they are going to get out of it. Dealing successfully with these expectations is an important part of the adult educators' task.

Different experiences of formal education. Adults may have different levels of experience of formal education. Some participants may have had little formal education, while others may have had negative experiences and as a result may lack self-confidence.

A wide variety of age ranges. Most adult education courses and workshops will be made up of participants from a wide variety of age groups, unless they are specifically aimed at a particular age group. Older participants may be nervous about exposing themselves to the ideas of younger participants. Younger participants may feel patronised by some of the "old timers."

Commitments. Adults will have a large number of commitments and responsibilities. These commitments may include work, family and social commitments. In this way they will be different from school students and some students in formal education. Women participants are likely to have a higher level of domestic and other family commitments.

The nature of adult participants

Some writers on adult education emphasise the positive nature of adults in relation to education. This is particularly true of the humanist school of educators. While there is much to be gained from this approach, in reality adults usually bring both positive and negative features with them to any course or workshop. It is important to understand both these positive and negative aspects if you are to work successfully with any group. Activity One is designed to help you think about this.



Key Ideas in Adult Education

Having looked at some of the main characteristics of adult learners, we can go on to consider some of the key ideas for effective adult learning. These are sometimes referred to as principles of adult education.

Needs Assessment. When a group of adults comes together to learn they may have different experiences and expectations as learners. Listening to these needs, discussing them and helping to meet them is a key principle of adult education. Needs assessments need to be carried out before a course/ workshop starts and also during the course / workshop.

Safety. Safety in adult education refers to creating a climate where participants' views are listened to and new ideas and information can be considered and evaluated. A safe environment for adult education includes trust between the facilitator and participants and trust in the curriculum or course material.

Sequencing and Reinforcement. Adult education workshops need to be designed in such a way that new topics and concepts are dealt with in an order that goes from simple to complex, or are organised around a particular concept. Wherever possible, the starting point should be the experience of the learner. This sequencing will assist the learner. In addition, key ideas will need to be reinforced in order to encourage learning.

Praxis. Praxis is a Greek word meaning reflection with action. The central idea is that adults do something, reflect on this action and then learn from this reflection and apply or change as a result of this new learning. In adult education this is sometimes referred to as the 'do, review, learn and apply learning' cycle. The importance of reflecting and action (praxis) is one of the central ideas of the popular education movement inspired by the work of the Brazilian educator Paulo Freire. Praxis is closely linked to the idea of learning by doing, the technical term for which is experiential learning.

Respect for the learner. Respect for learners as subjects of their own learning is based on the idea that adults are decision makers in most parts of their lives. They will wish to make decisions about when, what and how they learn. In this way they are the subject of the learning process and not the object of it. While an adult educator may assist with these decisions, individuals take responsibility for their own learning.

Ideas, feelings, actions. Adult learners learn through the mind, emotions and body. The technical term for these three aspects, or domains, as they are sometimes called are cognitive, (ideas and facts) affective (feelings and emotions) and psycho-motor (actions). Current thinking is that all three of these aspects are important in the learning process. Addressing all three areas are important principles of course design.

Relevance and immediacy. Most adult learners need to see the immediate usefulness of the new skills and knowledge they are acquiring. They want to spend time studying what they can apply now, or in the very near future. Connected to this is the idea of a problem centred approach to adult education. Adults respond to working through relevant problems and searching for solutions to these problems. In this way the education is relevant to their needs.

Collaborative learning. Adult participants learn from each other and this is sometimes referred to as peer learning. Presenting situations where adults can learn from each others'

experiences, as well as their own, is an important part of the adult educator's role. This can be done through general discussion but is also encouraged by the use of group work and team exercises.

The role of tutor/ facilitator. A key feature of most adult education is the changing role of the teacher or tutor/ facilitator. The tutor's role is to facilitate the learning of the adult education group. This means a different kind of authority to the traditional teacher in the formal education system. The relationship is more equal and there is a greater level of negotiation or dialogue involved between the facilitator and the participants. The facilitator is respected for the way learning is organised as well for their expertise in a particular subject or issue.

Critical thinking. Adult education is concerned with looking critically at the world and seeking alternatives to current ideas and circumstances. The ability to critically examine ideas, emotions and actions is an important part of the adult education process.

Critical analysis of the adult educators' role. As adult educators become more experienced they also need to think critically about their own roles and actions. This kind of professional critical analysis is best carried out in two ways: firstly by listening to participants and their evaluations, and secondly by engaging in dialogue with other adult educators facilitating similar education activities.

ACTIVITY 2

Your Own Experience

Aims

- To think about your own experience of education
- To examine some of these key ideas and relate them to your own experience.

Task

Working together in your small group, consider two of the keys ideas selected for you by the course facilitator. Discuss these two ideas / principles in your group and relate them to your own experiences of adult education. Try and find some examples of these ideas being applied or being ignored. Prepare a short report to the workshop, which briefly describes these circumstances.

- **What was the course/ education activity?**
- **How was the principle applied / ignored?**
- **What happened as a result?**

Three Case Studies in Adult Education

The key ideas and principles identified have been developed over the years by researchers, educators and radical educational thinkers. Union movements and educators working with unions have played a very important role in developing these ideas and often have been at the cutting edge of this development. The first two case studies below illustrate this well. The case studies are:

- The development of study circles in Scandinavia
- The work of the Highlander School in Appalachia
- The work of Paulo Freire and the rise of popular education in Latin America.

STUDY CIRCLES EDUCATION

Study Circles are a type of popular education. A Study Circle is the name given to a group of adults who come together on a regular basis to learn more about the world they live in and how they may be able to improve things. Study Circles developed in Sweden over a hundred years ago as a popular education movement. Today in Sweden, study circles are a way of life and are used extensively by trade unions and political parties for their popular education programmes.

Study circles are used mainly for membership education, where there is a need to educate a large number of participants for little cost. Union activists and members can be trained to organise study circles. They have also proved popular with trade unions in developing countries, because they are a cheap and effective way of increasing membership involvement.

Some of the key ideas of study circles are:

- They are democratic and study circle members decide for themselves what problems/issues they are going to deal with
- They are voluntary and informal
- The study circle leader is from a similar background to the members and is accepted by them
- Study circles look to improving their environment, whether the members come from a factory or community
- Study circles often look at the wider political and economic issues concerning how society is organised

Study circles have been around for a long time, but continue to develop and use new techniques. Recently, the International Federation of Workers' Education Associations (IFWEA) developed international study circles which brought together unionists from different parts of the world to look at the issues of globalisation and union responses to globalisation. This was done by using computers and on line learning tools. Several IMF affiliates took part in this initiative.

HIGHLANDER

Highlander is the name of a radical adult education school in rural Tennessee. Myles Horton founded Highlander in the 1930's to work with the poor and disposed of Appalachia. Highlander worked with mining, textile and agricultural workers who were struggling with ruthless bosses or trying to organise themselves into unions for the first time. Highlander developed a way of working with union activists and organisers that is best described in the words of Myles Horton himself:

'You have to know that working people have a past ... Adults come out of the past with their experiences so at Highlander you run a program based on their experience. Our job is to help them understand that if they can analyse their experiences and build on these experiences and maybe transfer these experiences even, then they have a power they are comfortable with.'

This approach, which came out of the experience of working with unionists and community activists, made a real contribution to the growth of general unions in the Southern States of America in the 1930's and early forties.

Highlander also became respected for its work with the civil rights movement in America in the fifties. In the South people of colour were denied voting rights, unless they passed a citizenship test. As many of them were both poor and illiterate they were in effect denied their democratic rights. Highlander developed a literacy programme which trained local community leaders as "teachers". These leaders used the Highlander approach with immediate success. The participants in these programmes were respected and also respected their "educators". As a result, most people involved in the programme passed their citizenship test with ease. The programme was so successful it served as a model for a wider civil rights movement programme used throughout the South.



PAULO FREIRE AND POPULAR EDUCATION

Paulo Freire was a Brazilian educator and philosopher, who developed a philosophy or approach to literacy education, working initially with the rural poor in Brazil. This approach led to the founding of the popular education movement in Latin America, Freire saw that the rural poor in Brazil were oppressed by what he called "a culture of silence". This culture of silence was created by the authoritarian, military dictatorship that ruled Brazil. He divided all education into two camps: education that accepted the status quo and the position of the poor in it, and education that liberated people and facilitated freedom. Education could not be neutral.

Freire used literacy education programmes to encourage participants to reflect on the social forces that surrounded them and defined their existence. By reflecting and understanding the true nature of their world they could then seek to change it. This idea of reflection and action he called praxis. An important part of this process involved getting people to name the world, using their own terms.

According to Freire, the role of the teacher or educator is to:

- **Break down the barrier between teacher and taught**
- **Speak the “same language “ as the learner**
- **Be aware of how they construct their universe of meaning**
- **Be aware of learning needs**
- **Start from where the learners are**
- **Encourage them to learn and explore their own experiences.**

Paulo Freire’s ideas led to the foundation of a popular education movement in Brazil and in Latin America. Community educators and religious groups working with the poor use his techniques and methods and they can also be found today in union courses and training courses.

ACTIVITY

3

Union Values and Adult Education

Aims

- To think about union values
- To relate these values to adult education principles.

Task

Working together in your small group, write down what you think the key values of your union are.

Once you have prepared this list look back at the key ideas of adult education and the three case studies. Identify any features they have in common.

Prepare a short report on the links between the two.

Notes

An Active Learning Approach

What Is Active Learning?

This manual is based on an active learning approach to union education. Active learning is based on many of the ideas we have explored so far.

It is the name given to an educational approach that is based on participants discovering things out for themselves and learning from their own experiences. The technical term for this kind of learning is experiential learning. There are a number of terms used to describe active learning. You may have come across some of the following descriptions:

- **Learning by doing**
- **Discovery methods**
- **Small group teaching**
- **Student centred learning**
- **Study circle methods**
- **Participatory education**

Whatever the term that is used, they all refer to a similar educational approach. The key aspects of this approach are:

- The learning process **starts from the experience of the participants as adults** and builds from this experience.
- Participants learn through **co-operative tasks** and activities
- Activities are designed so that participants **can share experiences and ideas** and learn from each other.
- Courses and activities are **problem centred** and participants work together to solve common problems.
- Learning by doing allows important **skills to be practised** which are useful in everyday life
- The activities that are carried out are **confidence building** and help participants develop their skills and knowledge in a supportive environment

Learning is based on the **do, review, learn and apply** cycle. Participants do something, review what they have done, learn from this experience and new information they are presented with and seek to bring about change.

Active Learning and Union Education

Unions around the world have become interested in active learning for a number of reasons.

Self Reliance. Active learning does not rely on experts or academics. Experience has shown that union activists and educators can be trained to carry out their own educational activities that are useful and effective.

Democracy. Active learning is democratic. Participants are treated with respect and work together collectively to make decisions. This is an important model for general union work.

Skills. Active learning allows important union skills to be practised-such as public speaking, chairing meetings, making presentations and thinking strategically.

Change. Unionists are interested in improving things at work and in the community. Active learning encourages action and helps develop strategies to bring about improvements in working life and the community. Participants are learning with the aim of bringing about change for the better.

Equality. Educational courses and study circles respect everyone's view and participants are treated equally. Unions fight divisions, prejudice and discrimination and strive for equality of treatment for all members. Active learning can demonstrate by example how this can be done.

Mass Education. Unions often develop mass education programmes, for membership education or for campaigns. Study Circles, which are based on a student centred model, allow this to be carried out cheaply and effectively. Study circles can be organised by union activists and representatives. They are cheap and effective.

SUMMARY

In this first part of the manual we have looked at

- The characteristics of the adult learner and his or her strengths and weaknesses
- Some of the key ideas in adult education
- Three historical case studies in adult education and union education
- What is meant by an active learning approach to education
- The relationship between active learning and union education

At the end of each part of the manual you will find a self learning activity to help you if you are working through the manual by yourself. If you have the opportunity you may wish to carry out these activities or discuss them with another union educator or study circle leader.

SELF LEARNING ACTIVITY

Carry out Activity Three entitled Union Values and Adult Education as an individual exercise. Write down the key values of your union first and then compare these to the key ideas of adult education. Draw up a list of similarities between the two. If you have an opportunity, discuss your list with another union educator or activist and see whether they agree with you.



Union Education Aims and Programmes

Introduction

In this second part of the manual we will look at the aims of union education. We will consider such questions as:

- What are the aims of union education?
- How can union education strengthen your union?
- How do you justify the costs of union education?
- How do unions build their education programmes and what values are these programmes based on?
- What are some of the key aspects of union education programmes?

The last two questions will be examined by looking at four case studies of good practice in union education. The four union case studies are:

- The Australian Manufacturing Workers Union (AMWU)
- The Canadian Auto Workers (CAW)
- The National Union of Metalworkers of South Africa (NUMSA)
- The Metal Workers Union of Brazil (CNM/CUT).

Aims of Union Education

Union education can strengthen your union and increase its effectiveness. It can do this by:

Involving, informing and activating union members. It is often said that a union is as strong as its members. The more involved your members are in the union, the stronger it is likely to be. Your members will also need to know about union policies and the reasons for these policies. Membership education programmes (study circles), mass rallies, workplace meetings, union campaigns and social activities can all contribute to this involvement. The aim of any membership education programme is to develop a well informed and active membership that will support union campaigns and struggles.

Building democratic organisation. Union education programmes can encourage democratic union organisation. They can do this by ensuring members know how to use the democratic procedures of the union to influence policy and decisions. Active learning also provides a model for democratic decision making that can be used to influence how union meetings and membership meetings are organised.

Making unionists aware of their rights. Union members need to know about their rights, if these rights are to be enforced at the workplace. If you take, for example, the right to know about the hazards of the workplace this right is now recognised in law in most countries. It is also recognised by international standards. Unless union reps and officials are aware of these rights they are unlikely to be enforced. Education programmes can ensure that unionists know about their rights and plan how to enforce them.

Equipping union representatives/officials with the skills and knowledge to effectively represent the membership. Union reps and officials need a wide range of skills and knowledge if they are to represent working people effectively. Education programme aimed at these groups can ensure they obtain these key skills and knowledge. This in turn will be reflected in more effective bargaining and representation at work. The skills and knowledge base will be changing and not static. In many countries, for example, there is a new wave of anti union activity being embarked upon by managements. Union reps and officials need to develop new skills to effectively deal with new reality.

Furthering the political aims of working people and their organisations Unions have always had wider political aims. In the past these political aims have led to the formation of social democratic political parties in many European countries. In South Africa, the unions in the eighties played a pivotal role in the fight against apartheid. Political union education played an important part in this struggle. This political education involved discussion about both the fight against the apartheid regime and the kind of society that would replace it. In the current world climate both conservative and social democrat parties are increasingly pursuing free market policies, which are often working against the interests of working people and their families. This means that there is a strong case for including wider political and economic issues in union education programmes.

Meeting the challenges of globalisation: Globalisation and the free market agenda are posing real problems for unions around the world. Increasing levels of privatisation of public services are affecting working people and their families. The casualisation of labour and increasing levels of part-time employment are undermining full time employment. Established standards of employment and pay are being undermined by unfair competition. Deregulation is also reducing hard won rights and standards. Unions need to respond to these new realities and union education can contribute by raising awareness of these issues and encouraging greater solidarity between unionists both locally and internationally. It can also promote the building of alliances with other groups in civil society fighting this neo liberal agenda.

Strengthening the union through organising. Strengthening the union by organising more workers has always been at the heart of union activity. In developed countries union membership has been falling rapidly due to many of the factors we have just considered. Unions are now seeking both new and old ways to organise and retain members. In countries like Australia, Canada, USA and the UK this has led to the formation of organising schools or units. Education departments of unions and national centres are working closely together to link education activities together with organising.

The Australian ACTU for example has combined the work of the education department (TUTA), with the organising unit into an Organising Centre. Organising is now the main focus of union education programmes carried out by the ACTU. While union membership is not falling in all countries, it is clear that organising and education are closely linked now and in the past, as illustrated by the Highlander case study from Part One.

ACTIVITY

4

Your Own Union Education Programmes

Aims

- To identify the aims of your own union education activities

Task

Working together in your small group, think about the education work of your own union and answer the following questions

1. **How many of the aims listed above are also evident in your own union education programmes?**

2. **Are there any aims that your own union education work has which are not listed?**

3. **Make a list of the aims that you feel are missing and place them in order of priority.**

4. **Select one of these missing aims and prepare a short report to give to the workshop on how you think the union can improve the education programme to include this aim.**

Union Education Programmes

Here are four case studies that describe how four IMF affiliates organise their education programmes.

THE AUSTRALIAN MANUFACTURERS WORKERS UNION (AMWU)

The Australian Manufacturing Workers union (AMWU) represents 150,000 workers in metals, printing, food, and vehicles. The union also represents technical, supervisory and administrative staff associated with these industries.

The union places a high priority on union education. Addressing the 2002 Conference, which celebrated 150 years of the union's existence, Doug Cameron, the AMWU National Secretary stated

“Our national education programme continues to build and develop- the program has to be a priority for the union. Education is the key to building our union- intellectual power must meet industrial muscle if we are going to be successful organisers and campaigners into the future.”

The importance of education is reflected in a comprehensive education policy and an active education programme that takes place at national, state and local level.

AMWU Education: Statement of Principles

The AMWU has a Statement of Principles, which guides the work of the union. This statement starts by indicating that the process of joining, building and strengthening unions is all a learning experience. Taking collective action is part of this learning experience. The formal and informal learning that takes place is directed towards collective gains for workers.

The statement indicates that in carrying out the national education program the union seeks to harness the knowledge and skills of unionists so that they become more able to transform themselves and those around them. Some of the key aspects of this transformation are:

- To promote the idea that the members are the union
- To promote solidarity between different groups in the union
- To aim for a strong union where the members are prepared to tackle and defeat the corporate agenda
- To build links with other social movements who are seeking to change society.

The Education Programme

The AMWU has a comprehensive education programme and was one of the first unions in Australia to have its own independent programme. This programme includes:

Delegate training. New delegates or union reps attend delegate training course. The main aim of these courses is to give new delegates the skills and confidence to represent their members effectively. The course deals with the role of the union in society, the role of the union delegate, and interpreting industrial agreements. Delegates are also encouraged to

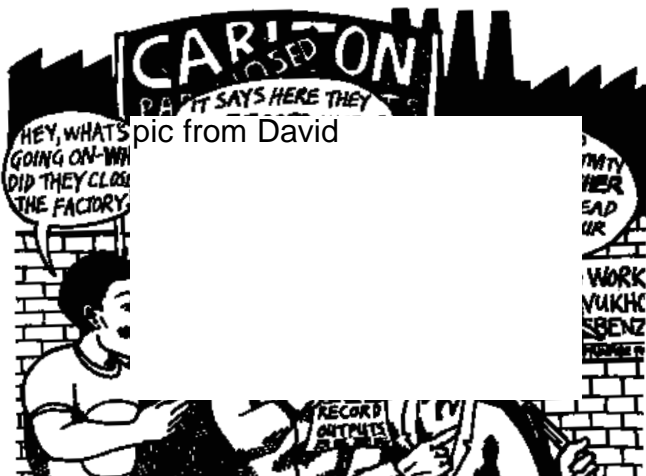
build up a local network of activists from all the different backgrounds represented in the workplace, to strengthen union organisation.

There is also advanced delegate training provided. The main aim of these courses is to give delegates the skills, values and confidence to represent their members in collective bargaining. Delegates learn to identify enterprise bargaining issues and develop bargaining skills. The course also seeks to develop awareness of the political, social and economic context of the workplace. Further work is also carried out on developing activist networks.

Women activist courses. A number of women activists' courses are being organised to help develop more women activists in the union and identify ways in which women's participation can be increased. The workshops are also exploring women's issues and how they are dealt with in the union. The number of women being employed in the manufacturing industry is steadily increasing. Once the current round of activist courses is complete, a series of recommendations will be made to the union leadership and to the education department about what the union can do to encourage women to participate more.

Member educator courses. In order to maintain a self-reliant education programme in the AMWU, the union trains a number of experienced delegates / activists as member educators. Initial training is a five day member educator course where participants learn to familiarise themselves with the AMWU education philosophy and educational material. They learn how to conduct educational sessions and manage discussion. The member educators then participate in the national education programme working alongside full time education officers, in delivering different courses. As they become more experienced, the member educators teach more and more of the delegate education programme.

Organiser education. The union carries out organiser education in an intensive national education programme that covers all aspects of an organiser's job. Union organisers learn techniques of targeting non-union members and non-union workplaces. They learn to identify deeply felt and widely held issues, which can be used to build an organising campaign. The training stresses the importance of would-be members or new members taking responsibility themselves for the organising campaign and establishing the union at a workplace. They learn to identify activists who will help mobilise workers and also be future union reps. Learning from the experience of other organisers is a key element of organiser education. Participants also carry out workplace based assignments to practice the new organising skills they have learnt.



These are some of the key elements of the AMWU programme and there are others. The different courses are not seen as separate and there are pathways for committed union delegates to become involved in membership education and organising. A holistic approach is provided by the statement of principles.

■ www.amwu.asn.au

THE CANADIAN AUTO WORKERS (CAW)

The Canadian Auto Workers broke away from the American-based United Auto Workers (UAW) in 1985. The union is the largest private sector union in Canada and through a series of mergers now represents 260,000 workers in manufacturing (54%), transport (16%), services (26%) and primary industries (4%). It is a national union with members all over the country.

The union sees union education as having wide social aims in addition to dealing with workplace issues and developing union skills. The CAW President Buzz Hargrove put it this way:

“Through worker education we can challenge each other and debate tough workplace and social issues. Together we are building a workers perspective on the world around us and a sense of the collective”.

The union has an extensive education programme that is delivered at the local level and through its residential education centre at Port Elgin, Ontario. Local courses are delivered in union halls or other areas close to the workplaces and communities. There are weekend schools and local union requests.

The Port Elgin Family Education Centre. The Port Elgin Family Education Centre is a residential facility built on the shores of Lake Huron in Ontario. It was originally acquired by a local branch of the then UAW in the late 50’s. It was bought and run by local union contributions and by a 1% levy on union subscriptions. Today, it has been substantially refurbished by the CAW and is described as the spiritual centre of the union.

The Centre runs a year round programme of one week, two week and four week courses for union members, reps and leaders. Each year, in summer, the Centre organises a two week education programme for union families. The Centre has child care facilities, is a cultural centre that celebrates the lives of working people and has been designed to fit into its local environment.

Paid Education Leave (PEL). The costs of all PEL courses at Port Elgin are met by paid education leave negotiated with employers. Clauses are negotiated in collective bargaining agreements where the employer pays a fixed amount per member into the union education fund. Once this has been negotiated then all CAW members covered by the agreement become eligible for PEL course held at the Centre. All the costs of travel and accommodation are met from the fund.

PEL Courses at the CAW Family Education Centre. The centrepiece of the Port Elgin programme is the four week course for activists, which takes place over a four month period. This four week programme links the workplace with broader social, political and economic issues. The aim of the four week programme is to assist union activists develop an understanding of the union, the workplace, the economy, politics and human rights. These five themes are examined together to help develop solutions to the problems they raise for working people in Canada and around the world. Participants in the four week programme also develop new skills in critical thinking, public speaking and strategic organising.

In its two week residential course for families held every summer, called the Family Education Program, recreational activities are arranged for younger family members.

There are also specially designed courses for teenage family members, built around their own interests, which are also designed to encourage social activism. Adult participants (both members and partners) combine learning and recreational activities designed to develop a better understanding of how to integrate union and social activism into the life of the family and the community.

The Centre organises a series of one week courses, mostly, but not exclusively, based on workplace issues. These include grievance handling, health and safety, bargaining, globalisation and solidarity, violence in the workplace, environmental awareness, building activism and human rights. One week courses are also organised for members from particular industries like the auto and aerospace industries.

Other Courses. This case study highlights some of the educational activity of the CAW. In addition to the Port Elgin PEL programme, the union also organises one-day local education activities, conferences on specific issues and responds to individual requests from local unions for courses. Where a group of workers have achieved a certified bargaining agreement for the first time they become eligible for a two day course. This tells them about the CAW and discusses their new responsibilities as union reps. They also have special two week courses for workers of colour and aboriginal workers and women activists.

According to Cheryl Kryzaniwsky, the CAW Director of Education:

“All of our education programs carry a very basic message: our union can and should be the vehicle for social change and improvements in the lives of all workers.”

■ www.caw.ca/index.asp



NATIONAL UNION OF METALWORKERS OF SOUTH AFRICA (NUMSA)

NUMSA is the second largest union in South Africa, affiliated to COSATU. NUMSA represents 230,000 members in engineering, car manufacturing and allied trades, tyre manufacture and the electronics industry. The union has a head office in Johannesburg and nine regional offices and employs around 300 staff. NUMSA was formed in 1987 by the merger of four different unions in the metal and car industries. This strengthened the representation of workers in these industries. The new union played a pivotal role in the fight against the apartheid regime.

The Education / Publications Unit

NUMSA policy is to spend 10% of union income on union education. Union education is organised by an education, publications unit at the head office, which has four staff. In addition to this there are nine regional educators. The responsibilities of the education department are:

- to provide training for all union staff.
- to provide training for the unions' 5,000 shop stewards.
- to provide membership education through NUMSA newsletters which are produced six times a year.
- to provide back up for policy formation in the union.
- for materials development, including booklets on key issues.

The union has trained approximately 100 member educators (administrators, organisers and shop stewards) to assist with the shop steward training programme.



The Shop Stewards Education Programme

The main purpose of the education programme is to give shop stewards the capacity to defend and advance their members interests. There are four main courses: Induction, the Labour Relations Act, advice / skills and industrial agreements.

Induction Course. This is a two day course for new shop stewards. The aim of the course is for new stewards to get to know about NUMSA and its history. The course also deals with the role of the shop steward in the factory the local branch and the community. Basic skills such as grievance handling are practiced. Key resources for this include a NUMSA booklet for reps and a publication called *NUMSA the Spear, COSATU the Shield*, which explains the relationship between the union and the National Centre or Federation.

The Labour Relations Act. This is a two day or three day course for shop stewards. The aim of the course is to give the shop stewards the tools to use the rights they have under the LRA. The resources for the course are the LRA gazette and a COSATU booklet and video on the LRA.

Advice / Skills Course. This three day course was originally developed for all NUMSA administrative staff and has now been adapted for shop stewards. It is aimed at giving shop stewards the information and skills to advice their members on issues that affect them at work and in the community. Issues discussed include how the unemployment insurance fund works, compensation for occupational injuries and diseases, tax tables and how to use them, pensions and provident funds. The resource for this course is a NUMSA advice / skills booklet.

Industrial Agreements. This three day course is for shop stewards who are covered by an industry agreement. It aims to give shop stewards the tools to understand their industry agreements and use this knowledge to defend their members at work. The course gives a general introduction to collective agreements and the LRA and collective agreements. Stewards carry out a series of problem solving exercises on their own industrial agreement. Resources for this course include a NUMSA Know Your Rights booklet, the appropriate industrial agreement and a Solutions To Common Problems booklet.

Main agreements 1 & 2. This is a more general course for auto sector shop stewards and also deals with collective agreements and the LRA. Stewards practise case handling skills such as taking statements and presenting a case. In Part Two, wider issues such a political economy and the auto industry, globalisation and industrial policy are examined.

Political forums. The union also conducts a series of political forums for activists and members. Recent forums have dealt with the fall of the South African rand and how it affects the working class, the role of unions in the struggle for socialism and a critical examination of a social accord in South Africa.

Current Problems. NUMSA is currently looking at whether it should carry out more membership education. The relationship between political education in NUMSA education programmes and party political education is also being debated.

■ <http://www.numsa.org.za/>

THE NATIONAL METALLURGICAL WORKERS' CONFEDERATION, BRAZIL

This National Confederation is made up of 96 unions which represent 1 million metalworkers in Brazil, under one single centre. The Confederation was created in 1992. The Confederation is a dynamic force within the Brazilian trade union movement

The Integrate the Training of Union Leaders programme

The Confederation has developed a partnership with two universities in Brazil to train union leaders under a programme which is called 'Integrate.' The Instituto de Economia da Universidade de Campinas, (UNICAMP) has helped construct a degree course on the economy of labour and the Universidade Federal de Sao Carlos (UFSCAR) has set up a degree course on planning and public administration.

The aim of these courses is to enable metalworker union leaders to face current challenges and to strengthen organisation and action in the workplace, in line with Confederation policy. Current challenges that metalworkers face include economic restructuring, new management techniques, unemployment, and the introduction of new technologies. One of the aims of the training programme is for union leaders to understand the wider context of these kind of changes.

The leadership programme has been mutually developed by the union and the two universities. The union leaders involved in the pilot programme critique the education sessions and lectures as they take place and there is a constant dialogue with the lecturers. This dialogue has proved a learning experience for both the participants and the educators and leads to changes in some aspects of the programme. The programme is a new experience for both parties. In the past the Universities in Brazil have not been involved in providing education for union leaders and activists.

The programme aims to train 500 union leaders and the course lasts for three years. Participants obtain a degree by completing a number of modules.

A three stage approach

Educational activities are organised on three different levels:

Monthly university sessions. Participants, who come from different regions in Brazil, attend the university for four days each month. Formal sessions are combined with an individual study plan that covers all aspects of the programme.

Study circles. When a participant goes back to their region study circles are organised with four other participants who come from the same region. The study circles meet regularly and carry out directed study and research activities related to issues covered in the course.

Planned action. Each participant gets a group of activists together once a month to discuss the issues covered in the course. They coordinate a reflection of these issues and plan some kind of action around these issues back in the workplace or the community.

This three tier approach encompasses individual learning, collective learning and learning through action.

ACTIVITY
7

The Scope of Union Education Programmes

Aims

- To think about the scope of union education programmes.

Task

Working together in your group, discuss the following questions concerning the four case studies.

1. How would you justify dealing with some of the wider political, economic and social issues in a union education programme aimed at members and union reps?

2. Are there any particular problems involved in teaching political and economic issues to unionists and how might you do it?

3. Can the teaching of key skills ever be considered political? Can you give any examples of this?

PART
THREE

The Union Education Process

Introduction

In Part Two we looked at union education and how it can be used to strengthen the union. In this part of the manual we will look at the union educator and what is involved when you organise education activities. Adult education is often described as a process. This is because it does not start with the beginning of a course or workshop and finish when the course or workshop is finished. Planning is needed before a course begins and participants hopefully continue to learn and act well after a course or workshop is ended. They also accumulate learning from a mixture of different sources, including the workplace.

We will look at three basic aspects of the education process:

Union participants: We will look at different groups of unionists or target groups as they are sometimes called.

The union educator: We will look at your job as a union educator or tutor and suggest a basic approach to take.

Education materials: We will look at the educational resources you will need and where you might go to find them.

UNION PARTICIPANTS

Participants in trade union education programmes will all be unionists. It is common to talk of participants as belonging to different target groups. Here are some examples of the most common target groups:

Union members. The strength of a union will usually depend upon the active participation of the members in the union. If unions are to be successful then they will need to involve their members in the union as much as possible. Most unions believe that providing education for members is an effective way of helping achieve this. Members will want to know more about:

- **how the union works and how they can become more involved**
- **what happens if they have a dispute with management**
- **how the union negotiates on their behalf and how they are involved in these negotiations.**

- **how issues like health, safety and the environment are dealt with**
- **how union income is used for the benefit of members.**
- **how the union is dealing with important issues that affect them**
- **what union policy is and how they can help implement or change union policy.**

Union reps. Union reps are often called different names in different industries and different countries. They are sometimes referred to as shop stewards, union reps, delegates or office reps in white-collar occupations. They are elected by the members in a workplace to represent their interests. In some countries union reps will have a legal right to union training or have paid education leave arrangements, (PEL) in their agreements. Union reps will be interested in finding out more about:

- **how to represent the members effectively**
- **how to deal with management**
- **how to deal with new workplace and community issues**
- **union organisation and union policy**
- **health and safety at work**
- **increasing the skills they need to carry out their role**
- **how to promote activism amongst their members and other union reps**
- **how to build and strengthen the union**
- **how to build alliances with other unions and community groups.**

Union Officials / Organisers. Union officials and organisers may be full time or part time and operate regionally or nationally. Most union officials will be able to attend education courses. Their time will often be limited, due to the pressures of their work. Union officials will be interested in:

- **learning more about issues that are affecting the union and the members**
- **developing new skills that relate to the needs of their work**
- **learning from others about effective organising and bargaining strategies**
- **learning about changes in the law or Government policy that will affect their work for the union**
- **learning more about the companies they are bargaining with and how these companies operate**
- **how to develop effective union campaigns**
- **global issues and solidarity with unions in other countries.**

Women members, reps and officials. Women unionists may have needs in addition to their education needs as members, reps or officials. Experience has shown that women often find it difficult to be active in the union and to become union reps and officials. When

they do achieve this, they often have to face additional stress. Most unions now have specialist courses for women members, as well as encouraging more women to participate in general programmes. Women's issues are also built into general courses. Women unionists will be interested in:

- **many or all of the same issues as men**
- **rights for women at work, maternity leave, etc.**
- **developing family friendly workplaces which help balance work and family**
- **how to become more involved in the union and how the union plans to encourage their participation and develop their leadership potential**
- **how to encourage other women members to join and become active in the union**
- **bargaining for specific issues that affect women at work**
- **solidarity with women unionists in other unions.**

Educators/study circle leaders. If your union is going to organise education effectively then you need to develop your own educators and study circle leaders. Educators will be interested in:

- **planning and organising courses, workshops and study circles**
- **educational methods training, including new ideas and methods**
- **learning to prepare their own educational material**
- **learning from other educators**
- **evaluating the effectiveness of courses and programmes**
- **learning about new delivery methods like online learning**
- **learning about union policy and campaigns, so that they can integrate them into their educational activities**
- **learning about union responses to globalisation at home and in other countries.**

Other Groups. These are the main target groups but there may be other specialist target groups who would benefit from tailor made courses. These may include health and safety reps, branch treasurers and administrators, office staff and others. All these groups will have their own needs and aspirations.

Dividing unionists into distinct target groups is useful, if you are developing an educational programme. There are dangers however in sticking to specific target groups too rigidly. It may be useful, for example, to hold a workshop of union activists who may be from a number of different target groups. You may choose to mix stewards and safety reps from time to time. The same may be true of union organisers and reps. The basic rule is to define what learning needs to take place and then decide who would benefit from being involved. Education built around organising and campaigning will usually need to have the involvement of many different target groups if it is to be effective.

A profile of your participants

Before you plan and organise a course it is useful to build up a profile of the participants. This will help you develop a course and materials that will meet their needs and be suitable for the characteristics of the group you are working with. The following activity will help you do this. You may find it useful to look again at some of the characteristics of the adult learner on page six of the manual, before developing your profile.



A Profile of Your Course Participants

Aims

- to think about your participants and their characteristics
- to see how their characteristics will affect the course you develop

Talk

So far we have looked at the general characteristics of participants as adult learners. Working together in your group draw up a profile of a group you will be carrying out educational activities with. How do you think this profile will affect what you plan to do? Prepare a short report on your ideas to present to the workshop.

- what would be their age range?
- what education will they have received?
- would they be able to read and write?
- how long will they have been in the union?
- how active will they be in the union?
- what kinds of jobs will they do?
- will the group have any particular characteristics you need to be aware of?
- what general expectations will they have of union education courses?

Notes

Surveying a group: The women of steel survey

Women are now 20% of the total membership of the United Steelworkers of America (USWA). This led the union to develop a survey of around 800 of these women members prior to a Women's Conference in 2000. The purpose of this survey was to understand the level of women's participation in the union and to learn about the concerns and issues that were important to them. Survey responses indicated that :

- While diverse in terms of race, marital status and occupation, women are primarily concentrated in blue –collar manufacturing jobs
- 87% of families depend heavily on the wages of the women. 47% of women surveyed indicated they were the sole breadwinner and another 41% contributed half or more of the family income
- Women want to be more active in the union
- Women view the union as a tool for change and for representing their rights in the workplace.
- Women were poorly represented at local level. 18% were on local executives and only 8% on bargaining teams and 7% were stewards.
- The top three obstacles respondents face in becoming more active were reported as:
 1. The need for education and skills development
 2. The lack of a necessary support network
 3. The fact that union agendas did not reflect the needs of women
- More than 75% of respondents wanted the union to become more active in social issues such as the free trade agreement (NAFTA), pay equity, sexual or racial harassment and the exploitation of women and children in the global economy.
- Women considered it important to discuss issues like sexual harassment and domestic violence together with other women in the union.
- The top four priorities for changes in the job are dependent care, retirement security, higher pay, and safety on the job.



You can find the full survey on the USWA website:

- www.uswa.org/uswa/program/content/index.php.

Go to the home page and follow the links to women of steel.

You will find a link there to the survey.

ACTIVITY

9

Responding to Women Members Educational Needs

Aims

- To think about the connection between the needs of women members and your education programmes and activities.

Task

The Women of Steel survey identified many different needs of women members of the USWA. If you were the education team of the union, what kind of plan and strategy would you develop for meeting some of these needs through an education programme.

Prepare an outline plan and strategy which includes a set of priorities for the union and put your plan on a flip chart or overhead sheet.

ACTIVITY

10

Identifying Learning Needs

Aims

- To identify the learning needs of a group of union participants.
- To think about how to go about identifying learning needs

Task

Working together in your group, select a group of people or target group you will be working with. Discuss this target group and identify the possible learning needs of this group by discussing what they might be with the other members of the group.

Once you have identified some of the key learning needs of the group come up with some ideas about how you might check this list out:

- before the course or workshop is due to start
- during the course of the workshop.

Prepare a report of your main ideas for the workshop on a flip chart.

THE UNION EDUCATOR

*Go to the people
Live with them,
Learn from them,
Start with what they know,
Build with what they have.*

*But with the best leaders
When the work is done
The task completed
The people will say,
We have done this ourselves”*

Ancient Chinese Saying



Your Approach as a Union Educator

A democratic approach. Your first task will be to set the tone for any course or workshop.

One of the best ways you can do this is by demonstrating that you have a democratic style yourself and you genuinely wish to involve all members of the course equally. You will find that you will be helped in the early stages when you explain the democratic nature of active learning and carry out some of the activities aimed at explaining this approach. After this it will be your willingness to involve the whole group that will matter.

Your authority. A teacher derives some of his/her authority from his/her position. In your case you are likely to be from a similar group and background as your participants. You will find that you will be respected as part of the group and for the efforts you make in organising the course effectively. You will not have to tell people what to do, but will obtain their co-operation as a comrade who is learning together with them.

Your responsibility. As a union educator, your main responsibility is to your union. You have a responsibility to ensure that the education courses you run are effective and in line with union policy. You also have a responsibility to your participants to provide a climate where they can learn and plan to turn this learning into action. Most unions have limited resources for education and most union participants will have limited opportunities to attend course or study circles. This makes it essential to provide effective education and training activities.

Sensitivity. You will need to be sensitive to the needs of different participants. There will be differing levels of skills and abilities amongst any group of participants and it will be your task to be aware of these differences. You can then set about improving the skills and confidence of some participants and ensure more experienced participants share their experience, without dominating.

Making education fun. Most of your participants will be working people or busy union officials. Education opportunities will be rare events and should be enjoyable. Making education sessions lively and fun will help to make them enjoyable and memorable events. You will need to develop the skills to do this whilst keeping a sense of purpose and giving participants the confidence to change things.

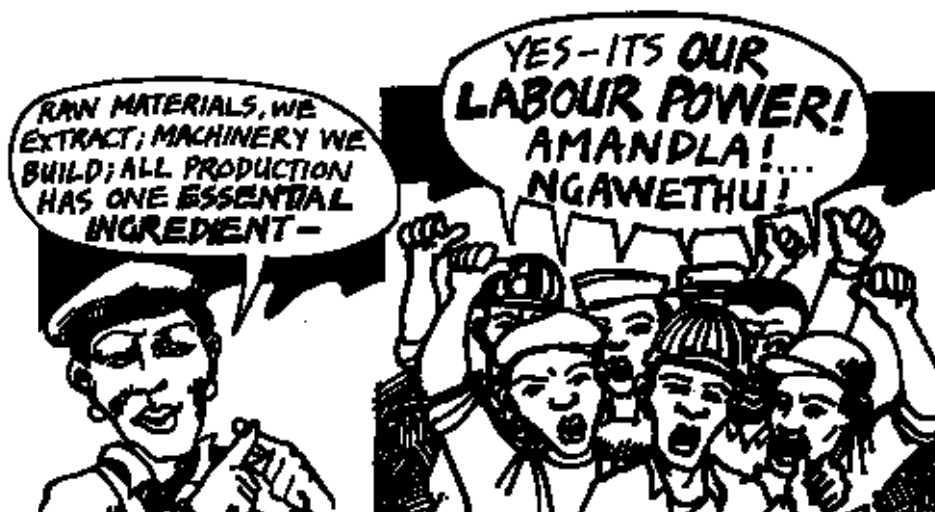
Flexibility. You will need to be flexible. In most courses you will have some clear aims and a number of set tasks to perform. It usually will be your responsibility to see the programme is carried out. At the same time you will be asking the participants for their ideas about what the course should include and how it should be adapted. You will have to balance their needs against the key tasks that need to be completed. This will require a flexibility of approach and a willingness to discuss any dilemmas that may arise.

Union policy. You will need to be aware of union policy and feed this into the course. In some cases you may find that union policy, which is based on the wider good, may be unpopular with any particular group. It will be your task to explain the policy and not just go along with the group. This is particularly important with prejudice and discrimination against women and ethnic groups. Being democratic does not always mean going along with people's views.

Opportunities to build union organisation. As a union educator or study circle leader you will find that there are many opportunities to help build and strengthen your union organisation. Here are just some examples:

- union reps' course could be used to discuss how to represent members more effectively and encourage more non members to join.
- branch officials' course could discuss how the branch is organised and come up with ideas for improving branch organisation.
- union organisers' course could be used to develop strategies to organise the unorganised and plan how to put this strategy into action.
- union officials' course could be used to examine the extension of collective bargaining to new areas that concern members.
- health and safety course could be used to develop a more effective health and safety organisation in the factory or in the union.

There is a close link between education and organisation and you should look for opportunities to build and strengthen the union in your education programmes.



CHECKLIST

General tips for union educators

Later on in the manual we will be providing tips for using small group or active learning methods. Here are some general tips for the union educator or facilitator:

- **Keep the atmosphere relaxed and enjoyable.**
- **Be punctual yourself and encourage the participants to do the same.**
- **If you are running a session be well prepared and have an overall plan of what you want to cover.**
- **Get to know your participants by name, as quickly as possible. Use nameplates to help you or make a brief sketch of people's names and where they are sitting.**
- **When facilitating discussion, challenge participants in a way that makes them think. In particular challenge generalisations and stereotypes.**
- **Let discussion flow freely, but steer the discussion to achieving the aims of the session.**
- **Look for opportunities to reinforce basic trade union policies and values.**
- **Ask for practical examples and personal experiences.**
- **Don't be afraid to use your own personal experience, if it is relevant and useful.**
- **Allow time for new ideas to sink in and check whether they are genuinely understood.**
- **Promote active participation between participants and get them to exchange experiences and ideas.**
- **Always summarise any session and stress the key points. Encourage the development of strategy or action when summarising a topic or issue. Make links with other parts of the workshop.**
- **Get used to using a notebook to write down any observations as to how any session went and how you might change things next time.**

STUDY MATERIALS AND RESOURCES

In the next section of the manual we will be looking more closely at small group activities and how to use them. We will also examine the different types of activities you can use. We suggest that small group activities form the basis of most of your education sessions. We also show later in the handbook how activities link together to provide a complete educational resource for a topic or issue you wish to investigate. Different types of whole class or whole group activities will also be suggested.



Small group activities, case studies and role plays will often need quite a lot of resources to back them up. Some of the main resources you will need include:

Labour laws, legislation. Many union rights are contained in labour laws. Issues such as bargaining, health and safety and labour standards are often dealt with by legislation. Remember that laws are often technical and difficult to understand. You should be looking for extracts that are concerned with the issues you are dealing with. In many countries, laws and regulations are summarised by pamphlets produced by the appropriate Ministry. Better still, the union movement or a sympathetic NGO may have written a summary of the law.

Union constitution/rule book. Most unions and national centres have constitutions. The union constitution will say how the union is organised and how union members can have a voice. Most unions will also have a rule book which lays down how union affairs are to be conducted and the rights and duties of union members. These will be essential documents if you are carrying out activities on union organisation and structures.

Union policies. Another important resource is union policy. Union policy is usually agreed at Conferences. You will need to find out if the union has written policies on the issues that you are dealing with as an educator. Remember that union officials and members need to know what union policy is if they are to put it into practice.

Collective agreements with employers. Agreements between the union and companies are a main resource. Recognition agreements and conditions of employment are essential resources. It may be useful to collect a series of model or “good agreements” to serve as examples to other groups of unionists.

Newspaper cuttings/magazine articles. As an educator you should always be on the look out for good articles in the newspaper and magazines, which you can use together with activities. On a course that meets regularly, you can ask the participants to bring in their own cuttings and articles that are relevant to the topics.

Films, videos and audio tapes. These can be useful additions to any course where there are facilities to use them. They need to meet a real aim of the work you are doing and not be used just for entertainment. They can bring issues visually to the course in a way that other media cannot do.

It is always best to preview any audio /visual material before use. This way you can make sure the material is useful. You can also decide how you can use it efficiently and link it in to other things you are doing on the course. You will need to look for films and videos that put forward a union viewpoint.

You will need to check that these key resources are readily available and you are able to find sufficient quantities of them. In some cases your union may have prepared educational material for you. Many unions, for example, have developed their own study material in the form of study circle books. This would be a great help if you were organising a study circle. You still may need to supplement this material with resources of your own. As you become more experienced, you will collect around you the basic resources you need to effectively carry out your education activities. Swapping experiences with other educators about useful materials will help you build up a stock of useful resources.

Where to find resources

As an active union educator you will find that your time is valuable. In many cases you may have other responsibilities in the union. Finding time to search for resources may be difficult. Knowing where to start looking is a help. Here are some of the main sources.

The union. Your union may have resources that can help you. Some unions will have specialist departments doing research, organising education and dealing with issues such as health and safety. Even if the union cannot afford specialist staff it may collect materials that will be useful to you as an educator.

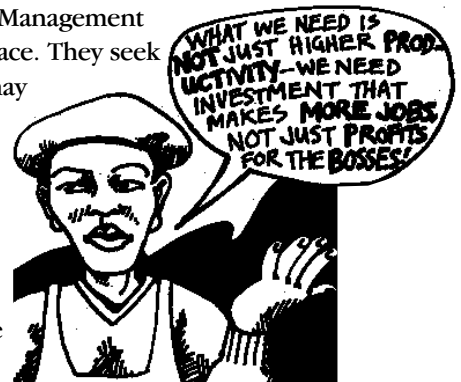
Labour friendly NGOs, research institutes. In most countries there will be friendly organisations that help the labour movement and can provide information. They may publish research into labour matters. If you are dealing with a subject like health and safety and the environment then there may be several organisations that will help you. You will need to look for organisations that are genuinely helpful and provide information that is user friendly and can be readily understood by unionists.

Libraries. Libraries can be useful. You will need to learn how to use a library and search for information if you are not familiar with them. Looking through a library for resources you can use may take a lot of time. You may need assistance from a friendly organisation to carry out an effective search for materials. Nowadays information is often kept electronically on databases and you may need help to search for relevant information if you are not familiar with computers.

The Internet. The Internet or World Wide Web is becoming an increasingly useful resource for union educators and researchers. Most unions now have their own web page as do international union bodies like the IMF and ICFTU. In addition, there are a number of web sites that specifically service unions. LabourStart, for example, is an online news service that has up to date information on union struggles and issues from around the world. At the end of the manual you will find a list of some of the most useful web sites and their addresses. If you have difficulty in accessing the Internet yourself then look for a friendly NGO that may assist you.

Government departments. Government departments will publish labour statistics, economic surveys, social statistics, laws and regulations. There may be a Government department in charge of publications or you may have to approach each ministry separately. Government publications can be lengthy and highly technical. You may find it better to turn to NGOs who interpret this information and may publish guides and key resources.

Management. This is an obvious, but difficult source to deal with. Management has access to nearly all the information in an industry or workplace. They seek to control this information and use it to their advantage. They may resist giving you or your union officials the information you need. Secondly when management do give information it may be slanted towards their own viewpoint and interest. The information may not be reliable or objective. Despite these difficulties, the amount of information that management has, and controls, make them an important resource. You need to develop the skills to obtain information you need and to be able to interpret the information you get from a union perspective.



Your members as the main resource

Whatever methods or techniques you use, you must remember that the participants are a main resource for carrying out any educational activity. There are many ways in which they can help:

- by bringing with them knowledge of the problems they face at work and in the community. They will also have experienced successes and failures in dealing with these problems in the past.
- by helping you organise the course and helping you decide what issues to deal with.
- by bringing with them information from their workplace that will contribute to the course or workshop.
- by bringing other information from newspapers and media on the issues you are dealing with.

In this manual we will look at how active learning methods can be used to make the most of your members' experiences and how you can build on these experiences to educate your

ACTIVITY

11

Improving Your Education Resources

Aim

- To think about how you can improve the resources you use to support your education programmes and study circles.

Task

Working together in your group make a list of the main resources you currently use to support your education activities and study circles.

Look at this list and see if you can suggest how you might strengthen your access to key resource material that you need.

Notes

SUMMARY

In this section of the manual we have been concerned with the process of union education. We have identified three basic components or ingredients involved in this process:

- the participants
- the union educator/study circle leader
- the educational materials or curriculum

In order to conduct successful union education programmes and workshops these ingredients have to be mixed effectively together. A successful result will require:

- designing courses that meet the needs of the participants / target group;
- having a jointly agreed set of aims for a course or workshop;
- being flexible about the learning needs of any particular group;
- developing an educational style that encourages involvement and participation;
- using effective active learning techniques and small group activities that are well resourced and designed;
- ensuring you use these activities in a way that allows you to build on participants' experience, allow this experience to be analysed and developed further to bring about improvement and change.

In the next two parts of the manual we will be focusing on how to design and use activities so that this can be achieved.

SELF LEARNING ACTIVITY

One

Make a list of where you go for resources to research and back up your education activities. Compare your list with the list produced on page 41-42. Make a note of any new sources you could now use.

Two

Write down a series of bullet points or headings that explain your approach to union education. Compare this with the text on page 38. Try and find another educator/union activist to discuss your approach with.





Group Work

- People remember:
- 20% of what they hear
 - 40% of what they hear and see
 - 80% of what they discover for themselves

Introduction

These statistics are the results of research on how people learn. If union education is going to be effective then we need to look at ways in which we can encourage learning by doing.

In this part of the manual we will look at active learning and group work. By the end of this part of the manual you will:

- know what small group activities are and why we use them
- be able to carry out practical sessions using small group activities
- understand the various stages you have to go through to use small group activities effectively
- practise the skills involved in writing your own activities
- look at some different ways of working in groups
- consider the effectiveness of group work.

Using small group activities

If you are organising a study circle, workshop or course you will find that facilitating general discussion is useful, but limited. You will be able to make your study circles and courses more interesting and active by using small group activities, or education activities, as they are sometimes called.

What is an activity?

A small group activity is the name we use when we divide up participants into small groups to carry out a task. Other names, sometimes used, are educational activity or buzz group. From now on in the manual we will simply use the word 'activity'.

Activities usually have:

- **an aim or set of aims**
- **a task which describes what needs to be done**
- **details of how the group will report back to the participants on the course.**

If you are not familiar with activities and how to use them, then this part of the manual will help you see what is involved in using activities as one of the key components of your education work.

If you are familiar with activities, then this section will help you revise your approach and consider how you may improve your educational skills. You may have experienced workshops or training where group work has been carried out ineffectively. Group work can be well organised or poorly organised, just like any other kind of teaching and learning.

Why we use activities

We discuss in the next part of the manual how to manage discussions effectively. You will find that general discussion is very useful, especially if it is structured, but can also be limited. Activities are a way of making general discussion more focused and they will help participants analyse problems, based on their own experiences. The main advantages of using small group activities are:

Active participation: Participants are likely to be more active in a small group. They will be involved directly in the task that has to be carried out.

Team work: Participants will get used to working in a small team and working co-operatively and democratically.

Skills: Important union skills are practised in small groups like consensus building, leading discussion and presenting collective ideas.

Testing Ideas: Participants will be able to test out their ideas. They may be much more willing to do this in the security of a small group.

Problem solving: Activities allow participants to analyse their problems in detail and work towards possible solutions. A problem solving approach is central to active learning methods.

Improving things: When groups report back on their findings it is possible to put their ideas together and see how things can be changed or improved in the future.

For all these reasons we suggest that you use activities to strengthen your education sessions, study circles and workshops. If you are working with your own educational material then you will find that it probably includes activities. If not, then you can think about writing some activities yourself.

Designing a suitable activity that works well is a skilled task. You will need to test it out before introducing it on a regular basis into your study circle or workshop. Getting ideas for activities from other union educators is always useful.

Organising an activity

We will now look at what is involved in organising an activity. A well organised activity can be interesting for the participants and produce good results. Organising an activity is not difficult if you follow some basic rules. We will look at what is involved in a number of stages:

Stage One: Introducing the activity

Having selected a suitable activity the first thing to do is to introduce the activity to the participants. You will need to:

- explain how the activity fits into the overall work of the study circle or course
- explain the aims of the activity
- explain the task and make sure everyone understands what is to be done
- explain how the groups are going to report back once they have completed their task
- state how much time the groups have to complete the activity
- stress that you are available if any of the groups needs advice.

Stage two: Group selection

The next stage is to select the groups who are going to work on the activity. Experience suggests that the most effective groups have between four or five people in them. If the group gets any bigger than this, it can split into two groups or some group members may find it difficult to contribute.

There are several different ways to divide up the participants. If, for example, you wanted to divide the course into four groups of four you could:

- ask the participants to number themselves from one to four, going around the participants. The participant's number then becomes the number of the group they will be in.
- take the first four people and say they are in group one, the second four in group two, and so on.
- decide who goes into which group by name. Select the groups, for example, by ensuring there is a mix of experienced and new members in each group. Alternatively, make sure there is a mix between talkative and quiet participants in each group.
- divide up the course participants by where people work or the region of the country they come from. This could be effective if you wanted to compare what happens in different workplaces or different regions.
- ensure women and men are represented in the groups or alternatively form one / two groups made up only of women or only of men if you want to examine possible gender differences in looking at a particular problem.

Some of these methods of group selection may combine and others may conflict. The most important point is to vary the group selection depending on the task that is to be carried out. The aim is to match your group selection with the task to ensure an effective outcome.

TIPS FOR EDUCATORS

Group selection

- Wherever possible try and keep the size of groups to four participants and a maximum of five.
- You should vary group selection and give different people the opportunity to work with each other.
- In some cases the group selection will be related to the specific activity being carried out.
- However ever you decide to divide people into groups, you should think about this as part of your planning for the session. It also helps if you write on a board or flip chart who is in which group.

Stage three: Supervising group work

You will need to be available to help the groups from time to time while they are completing their task. Here is a list of things you can do in order to supervise group discussion effectively:

Appointing a chair. It may help if each group appoints a chair to supervise discussion. This will help the group discussion and make sure the task is completed within time limits. It will also allow important skills to be practised by the person acting as chair. You may find that after a while it is not necessary to suggest appointing a chair as your participants become used to working effectively in groups without one.

Appointing a group recorder/rapporteur. It will help if one person records the main ideas and the decisions of the group. This person can then report back on the group's findings. As with the chair, the recorder will also be practising important union skills, such as making presentations and public speaking.

Understanding the task. At the beginning you should allow the groups to settle for a few minutes. You will then need to circulate between the groups and check that they all understand the task.

Be available. You will need to be available if the groups need help or advice. They may get stuck with a particular part of the activity or be unable to agree on an issue. In some cases they may misunderstand the task they have been given and will need redirection.

Time. Now and again you will need to remind the groups of the time they have to complete the task. Here you will need to balance the need to complete the task on time with the need to allow for adequate group discussion.



TIPS FOR EDUCATORS

Supervising group work

- **The role of rapporteur can be decided by the group, but you should try and make sure that everyone gets to do it if you are conducting a study circle or lengthy course. If you are also using people to chair the groups then also try and make sure this task is rotated.**
- **If you have participants who cannot read and write with confidence then you will need to be sensitive to this and make sure they are not asked to do things that will undermine their confidence.**
- **You need to distinguish between helping groups with the task they have been set and providing the answers for them. Your aim should be to guide them to come to their own conclusions**
- **Learn the skill of listening to a group's progress without necessarily intervening in the group discussion.**

Stage four: Reporting back

There are several different ways of organising how a group reports back to the study circle or course. Here are three of the main ways this can be done.

Through the educator. In this method, the groups report back on their findings to the educator, who writes on a board or flip chart the key points raised by the group. If groups give different solutions or answers then these can be debated to see if a consensus emerges. You will find you will be able to stimulate argument and draw out key points using this report back method. You will also be able to filter the views of the groups and reduce repetition.

Group presentation. The groups make their own presentations on a flip chart or OHP to the rest of the course. This is a more active method and allows important skills to be practised. Once a group has made their presentation, the other participants can discuss their ideas. Participants will need confidence and support to attempt this kind of report back. This method does not always work well if the groups have all been given the same task as it can become repetitive. It will also lengthen the time you need to take all the reports.

As a meeting. In this method the groups report back to a meeting. An example would be if the groups had been asked to identify different health and safety hazards and find out what they can do about them. The report back could then take the form of a union meeting to discuss what to do about these health and safety problems. This method is active and involving. As with group presentations, you will need to allow enough time for this report back method.

Whatever report back method is used it should suit the activity and be explained clearly when introducing the activity. You will find that you will need to vary the report back methods you use according to the time available and the nature of the task you are asking the groups to carry out. Whatever method you use, you should seek to obtain a high degree of involvement amongst both the group reporting and the other participants.

TIPS FOR EDUCATORS

- If you are taking the report back yourself, you do not have to write down all that a group reports. You can summarise what they say and just express the key ideas. If the point is unclear then you can ask them to clarify their idea before you write anything. If the activity contains a number of questions, then you can ask different groups to comment on different questions to avoid repetition.
- When a group makes its own presentation, important presentational skills will be practised. The reports are likely to take longer and you should make allowances for this. If you ask groups to report back on different aspects of the same problem then you will avoid repetition.
- Running the report back as a meeting can be useful. You will need to make sure people don't get carried away and the session becomes too long. You will also need to summarise the main points to be learnt after the "meeting" is finished.
- Some activities may not need any report back, as sufficient skills and knowledge have been picked up by the group and there will be more important report backs later

Stage five: Summary

This is the final stage of organising an activity. It is important that you summarise the activity and bring out any main lessons that have been learnt. We suggest that you summarise every activity by listing some key points on a blackboard or flip chart. You can use the summary to:

- spell out any main lessons that have been learned
- underline union policy or any basic union approaches
- finalise any outstanding arguments that remain
- suggest what action participants can take to improve things
- link the issue dealt with in the activity with any future sessions
- refer back to the aims of the activity or the aims of the course



ACTIVITY

12

Observing an Activity

Aims

- To see what is involved in organising an activity
- To practise the skills of observing and noting what you have observed.

Task

Your course tutor/instructor will organise a model session using a sample activity. Observe what s/he does and note down on the observation form what happens. You will see that the observation form is in three sections and one or two of you should take a section each. At the end of the activity your group will report back on what they have observed.

Model Session Observation Form

Stage 1 & 2 Introduction and group selection

Stage 3 Supervising group work

Stage 4 & 5 Report back and summary

ACTIVITY

13

Practising Using Activities

Aim

- To practice the skills involved in using small group activities

Task

Your course tutor will divide you up into groups of 2/3 and each group will be asked to organise an educational activity. You can select which activity to organise from the examples of activities provided by your tutor or from your study circle material. You will be given time to prepare and it is suggested that you allocate different stages to different members of the group. The other members of the training course will play the part of participants.

ACTIVITY

14

Writing Your Own Activities

Aims

- To practise designing your own activities
- To plan how to organise an activity

Task

In your group identify a key issue your union faces. Design an activity to deal with this issue.

Think about what you want to achieve, the skills you want to develop and the resources you will need.

Notes

CHECKLIST

Using activities

You may find the checklist below a useful guide when you are preparing to use an activity.

Checklist Using an Activity

Introducing the activity

- explain the aims of the activity
- explain the task and check everyone understands
- explain how the report back will be organised
- state how much time the groups will have
- stress your availability

Group selection

- maximum size of four in group
- change people frequently between groups
- mix confidence, skills, experience and personality
- rotate offices of chair and secretary
- think of your group selection beforehand and write it down before introducing the activity

Supervising group work

- suggest groups have a chair, if participants are not used to groups
- make sure someone takes responsibility for reporting back (rapporteur)
- allow groups to settle and then check task is understood
- check progress without disruption
- be available and redirect where necessary
- check time and allow more time if this would help

Report backs.

- record and highlight key points as briefly as possible
- pursue disagreements between groups constructively
- use an effective report back method for the activity in question.

Summary

- refer back to the aims
- highlight any key points/lessons.
- highlight any union policies/messages
- emphasise action and improving things
- make links with other parts of the study circle

Other kinds of group work

Placing participants into small groups of four or five to examine a problem or issue is a key aspect of active learning. As this has become a common approach to adult education and training, more work has been done on what actually happens in a group and the levels of communication. More attention has also been paid to the varieties of different group work that can be used and how these might address some of the problems associated with group work. These problems include, for example, repetitive report backs and the amount of time small group work can take. A further problem is that while most union learners will prefer group work to passive learning there are some learners who do not work well in groups and prefer to reflect on issues by themselves.

Working in pairs

Asking participants to work in pairs is a useful tool for the adult educator. Working in pairs ensures a high level of activity can be set up easily and is not usually time consuming. Here are three examples:

- At the beginning of a course the participants are asked to turn to the person next to them and introduce themselves. Before doing this they take each letter of their name and pick a word that begins with the same letter and that describes something about themselves. They each explain this to their partner, who takes some notes. Each participant can then quickly introduce his or her partner to the whole group.
- During a course on organising, participants are placed into pairs and ask to relate an organising success story to their partner. Each person is given a maximum of five minutes to relate their story to their partner. After ten minutes the tutor asks three or four people to relate their stories to the whole group. This exercise is used to start the ball rolling and is followed by other activities which focus on the key elements of effective organising.
- At the end of the second day of a five day course, participants work in pairs to reflect on what they have learnt so far. They are asked to identify two or three of the most important things they have learnt and relate this to their partner. They are asked to keep a note of the ideas they have come up with to refer to at the end of the course.

Snowballing

Snowballing is the name given to a particular type of group activity. Participants are asked to reflect on an issue or problem. They then discuss this issue in pairs and, after working in pairs for a while, two pairs are joined together to further refine their responses. When the groups of four have combined their experiences into a stronger solution to the problem there will usually

be a report back to the whole group. Alternatively you can snowball them into groups of eight. A good example of a snowballing activity is Activity One in Part One of the manual on page 9.

Snowballing can combine the strengths of working in pairs with the strengths of wider group work. It can ensure a relatively high level of initial interaction. It also demonstrates the value of involving more people and their experiences in solving a problem.

Jigsaw Groups

A jigsaw activity is organised in two different stages. Small groups start by examining separate case studies or different aspects of the same problem/ issue. They are asked to examine and discuss the issue until they understand enough about the topic to tell another group about what they have learnt or understood.

In the second stage the groups are reconstructed so that each new group is made up of participants that examined all four of the different issues /case studies. Each group member then relates what he or she has learnt to the other members of the group in turn. An example of a jigsaw activity is Activity Six a on page 28 in Part Two of the manual.

Jigsaw groups help reinforce new ideas or issues as participants in Stage One learn something new and then have to explain this new knowledge to someone else, thus reinforcing the new learning. They can also be used to sharpen listening skills. There is no need to have report backs to the whole group.

Role Plays

Role plays are very common activities and will involve participants in performing a particular role or roles. In a role play, participants are asked to adopt roles and act out a pre given situation. A classic example would be unionists interviewing a non-member and persuading him or her to join the union. Other common role plays involve bargaining with management, reporting back to members, public speaking, or dealing with the media. An important aspect of role plays is to ensure that they have a strong educational message and are not merely introduced for their entertainment value. Role plays are often fun, but they need also to have educational value.

Union skills practised in role plays include:

- public speaking,
- putting across arguments,
- developing a consensus,
- negotiating skills,
- giving reports and taking part in meetings.



Organising Role Plays

There are several different ways that you can organise a role-play and here are three of the most common:

- You can divide your participants into different roles (for example, a union organiser, a non member and an observer). This has the advantage of everyone having something to do. The observer will be able to draw out what has happened in the role play.
- A second approach would be to divide up a number of roles and act out the role play in front of all the other participants. This may be useful if you are faced with a large number of participants which would make the first method difficult. You should be aware that the participants that carry out the role-play might well be nervous performing in front of an “audience”.
- You can divide most of your participants into two teams (for example, management and union, and give them a brief and time to prepare for a negotiation. The role play will be the negotiation. You can be the observer yourself or appoint one or two participants as observers.

All role plays need to be reflected upon after they have been carried out. It is helpful in most cases to appoint observers to do this. They will be able to analyse what actually happened in a role play, rather than what those involved thought happened. Observers are usually selected from the participants. An alternative would be for the facilitator to act as observer.



As well as reviewing what happened in the role play it is important to summarise the key points and draw some overall conclusions. The last part of any session that has involved a role play should be a summary of what has been learnt.

Here is a Checklist for using role-plays.

CHECKLIST

Preparation

- Make sure that each person involved in the role play has a clear brief. A brief should have sufficient information, but should not include superfluous information.
- If you have not used the role play before, test it out first to see what happens and how long it takes to complete. You may be able to improve your briefs.
- If you are using observers give them an observation form to help them.
- Think twice about using a role play at the beginning of a course before you and the participants have got to know each other. You may put an inexperienced participant under pressure to perform in front of relative strangers.

Introducing the role play

- Introduce the role play and explain the aims.
- Make sure participants understand their brief and give them sufficient time to prepare.
- If you have divided participants into opposing teams make sure they can prepare for the role without being overheard by the other side.
- Make sure that any observers you are using know what they are looking for. Encourage them to balance any negative comments with positive comments when they report back.

Running the role play

- Once the role play starts, be prepared to intervene if it is going badly wrong or becomes side-tracked or if people are breaking out of their roles.
- Try and make sure the role play does not go on too long. Be prepared to stop the role play if you think enough ground has been covered.

Reflecting on the role play

- Immediately after the role play it may be useful to have a short break to allow people to calm down and readjust themselves.
- If you have used observers, take the observers' reports on the role play.
- Guard against participants becoming too defensive when they hear the observers' comments.

Summarising

- Following the observers reports summarise the main things that have been learnt from the role play.
- Relate these back to the aims of the role play.
- Make any links with future parts of the workshop/ study circle.

Making group work more effective

Using pairs, snowballing activities, jigsaw groups and role plays will help to vary group activities and may assist with time management problems. If, during a course or workshop, you find that the communication in the groups is still not very satisfactory then there are things you can do about it. If, while you are supervising group work, you become aware of some people dominating a group or a clash of personalities then you can intervene. You may also decide to change your future group selection.

Another thing you can do is to ask participants to analyse how they are contributing themselves. Here are two self- assessment checklists that are designed to raise the awareness of your participants about how they are contributing.

SELF-ASSESSMENT FOR COOPERATIVE GROUP WORK 1.

Tick the statements that were true for you:

- I liked being in the group
- I listened to others
- I learned something
- I talked in the group
- I talked too much
- I helped other people
- I didn't talk much

SELF ASSESSMENT FOR COOPERATIVE GROUP WORK 2.

About myself

- I spoke in the group
- I listened to other people's ideas
- I suggested an idea to the group
- I encouraged other people to contribute
- I felt comfortable working in the group
- Working in the group made me feel anxious
- Working in the group made the task easier
- I would have preferred to do this task alone
- I would have preferred to do this task with just one other person

About the group

- Everybody contributed to the task
- One or two people tended to dominate the discussion
- Some people in the group just did their own thing
- People could ask the group for help if they didn't understand

These kinds of self awareness activities can be introduced immediately after a group work session. They are designed to help participants to reflect on their contribution to group work and their willingness to listen to others.

SUMMARY

In this part of the manual we have looked in detail at what involved in using small group activities that are problem centred. If you are using small groups for the first time you will find the stages of group work useful and also the tips for educators may be helpful. If you are experienced in using small group activities then it may be useful to revisit how you organise them and how you might improve your delivery.

We then went on to look at some variations of small groups which included working in pairs, snowballing, jigsaw groups and role plays. If any of these are new to you, we suggest you try them out to see how well they work.

Finally we considered how well participants communicate in groups and suggested some ways of making your participants reflect on this. In the next part of the manual we will look at teaching and learning activities that you can carry out with all your participants as one large group. As we will see in Part Five, many of the things you can do when you are all together are also active and participatory.

SELF LEARNING ACTIVITY

One

Read through the first section of this part of the manual on using small group activities. Reflect on your own practice and make a note of any improvements you might make in future. Look for an opportunity to try these improvements out as soon as you can.

Two

Look at the section on other kinds of group work. Identify any that you have not used and find an opportunity to try them out in your education programmes.





PART
FIVE

Active Learning and the Whole Group

Introduction

In Part Four of the manual we looked at group work and how to organise group work effectively. In part five of the manual we will now look at how you can promote active learning or involvement working with all your participants together. We will look at:

- **managing discussion to promote active involvement**
- **whole group activities**
- **using speakers**
- **organising field visits**
- **using films and videos.**

When we consider each of these topics we will look at how they can be built into an active approach to union education.

Managing General Discussion

There will be many times during a course or workshop where you will be managing a general discussion with all the participants. General discussion may arise when dealing with a topic or issue or when summarising a small group activity. Your main aim will be to ensure that there is a full discussion, which reaches a positive conclusion. Here is a checklist of things you can do to manage discussion effectively:

CHECKLIST

Managing Discussion

- start by introducing the topic/issue briefly and clearly. If it is a complex issue think of three or four headings under which the discussion can be structured and introduce these to the group
- allow the discussion to develop and do not dominate the discussion yourself
- use open rather than closed questions to get discussion going
- try and make sure that the discussion is not dominated by one or two people and that everyone contributes. Draw in people who you think might wish to contribute and have been unable to do so
- if conflict arises between participants then mediate between them quietly and firmly. If they are unable to agree then at least get them to respect each others rights to their opinions
- if the discussion begins to wander off the point, restate the aim of the discussion and bring it back to the main points you are considering
- if it is becoming too vague then introduce concrete examples or ask the participants for examples from their own experience
- look for opportunities to reinforce any basic union messages you want to get across
- make connections with previous education sessions where this would be useful
- summarise the session briefly and reinforce the main conclusions that have been made. It often helps to write these on a flip chart
- at the end of your summary highlight what action needs to be taken to improve things. Link the discussion to any future sessions where some of the issues may be discussed again.



ACTIVITY

16

Managing Discussions

Aims

- To learn how to deal with problems associated with general discussion

Task

Working together in your group say how you would handle the following problems that might arise. If possible, try to write down in a couple of sentences what you might say or do.

1. You are running a course with all male participants. There have been several derogatory remarks about women and some comments that are sexist. What would you do?
2. You are having a discussion about how to deal with workers who won't join the union. Some participants feel that people should be made to join, while others feel they should be persuaded. There seems to be no agreement possible. What would you do?
3. You are discussing how to deal with supervision and one participant raises a personal dispute he has had with a particular supervisor. Whenever you or other participants try and identify some general principles he returns to his particular dispute again and again.
4. You have two very forceful and experienced members in the group. They tend to dominate discussions and although their contributions are interesting the other participants are not fully involved. You have just completed a discussion for half an hour on union democracy and these two participants have dominated again.
5. You have two participants who are very quiet and say very little in general discussions. You have made one or two attempts to involve them in discussion but without

Notes

ACTIVITY

17

Developing a General Session

Aims

- To develop a structured approach to a general session
- To practice developing a session plan

Task

Working together in pairs, select a topic you wish to deal with and develop a set of questions to ask your participants in a general discussion. Make a note of any general union principles you would seek to reinforce, during this session

When you have completed your notes you will join together with another pair and exchange your ideas.

Whole Group Activities

There are several ways in which you can involve a whole group of participants in an activity. Some of the ideas for whole group activities have come from community educators working with the popular education ideas of Paulo Freire. Here are two examples.

Example One Sculpture Activities

Participants on a course are asked to form themselves into a sculpture or representation of management and union. The idea is for the whole group to form a picture of the power relationships that exist between management and union at the workplace. One or two participants may stand on a table and be management while the rest are seated on the floor. Some participants may stand up to represent supervisors between management and workers. A group of workers may lie on the floor representing part time workers, who have fewer rights. Some participants may lift up another on to the same level as management as this is the union rep, backed by the members.

The group may then be asked to form themselves into their vision of what the power relationships in the workplace should be. They will usually form a sculpture, which represents greater equality or where workers have more control of the workplace.

Sculptured activities like this are usually fun, involve everybody and can be used as an introduction to a discussion on the power issues raised.

Example Two Floor plans

In this example the tutor/ facilitator is working with a number of union reps from different workplaces. The tutor draws an attitude to the union scale by placing cards along the floor in a continuum or line as follows:

Management Attitude to the Union

Celebrates the union

Encourages the union

Tolerates the union

Discourages the union

Is aggressively anti-union

Participants are asked to stand next to the attitude which they feel represents their own management's view of the union.

Following this activity a discussion takes place on why different management attitudes exist, how they might change and what union strategies are appropriate for different management attitudes. Critical questions can be raised also as to whether tolerance is a positive or a negative attitude.

There are many such examples of whole group activities. They are useful icebreakers; they appeal to the visual senses and can represent a useful break from oral and written activities.

Mapping

The two examples given are sometimes referred to as mapping activities. Mapping is a technique where a group of participants are asked to map out their environment in some way or other. Mapping can be done as whole group activity or in small groups. The mapping might be of the physical environment or might refer to such things as social relationships or attitudes. Participants are usually asked to construct their own map or are sometimes asked to fill in a pro forma map. Here are some examples of common mapping exercises used in union education.

Organising

The current emphasis on organising in many union education programmes has led to the development of several mapping techniques:

- A group of shop stewards who are exploring how to strengthen their workplace union organisation may be asked to draw a map of their worksite and indicate which parts of the workplace they have strong union membership and which parts they don't. They can then analyse why this is so. This information can then be used to develop a recruitment strategy to persuade more workers to join up.

- Smaller groups of reps might draw up a map of their own departments and indicate who is a member and who isn't by name. This kind of mapping might also be used to identify who are potential activists. Another approach is to draw a relationship map of a section or department. A relationship map indicates who relates to or is friendly with whom. This may be useful in building up networks of supporters.

Occupational health and safety is another area where mapping exercises have proved useful. Here are two examples:

- A group of safety reps may be asked to draw a map of the factory floor or office and identify on the map where there are any hazards to the members working there. They might be asked to draw this from memory or if they are going back to the workplace and returning to the course they can discuss their map with other reps and members and then bring back the results.
- Body mapping is the name given to a technique where safety reps are given a silhouette of a body from the back and the front. They discuss these body maps in their group and indicate where on the body they or their members may be injured or exposed to occupational health risks. The results can then be used to identify and discuss the occupational risks in the workplace.

One of the advantages of mapping exercise like this is that the techniques can be practised on a course and can then be used back in the workplace or in the union as a useful analytic tool.

Brainstorming

Brainstorming can be carried out in small groups, but is usually a whole group activity. Participants are asked to come up with as many ideas as possible. Members of a health and safety course may be asked to identify as many workplace hazards as they can think of. Participants in an organisers' course may be asked to list as many forms of industrial action as they can. The golden rule of brainstorming is that all ideas must be recorded without question in the first instance. Brainstorming is concerned with quantity and not quality. It is a way of defining the total area of a problem or issue.

There is usually a second stage of brainstorming when the ideas are subdivided in some way. The workplace hazards may be divided into physical and chemical hazards for example. The various forms of industrial action may be divided into low risk and high risk activities. Brainstorming is a popular way of starting up a new topic or doing work on a workplace problem



ACTIVITY

18

Preparing a Whole Group Activity

Aim

- To practice preparing a whole group activity.

Task

Working together in your group, come up with an idea for a whole group activity. Describe your activity, who it is designed for and how you would intend to use it.

The whole group activity must be active and have a strong visual element. You should also indicate how you would follow up the issues raised in the whole group activity.

Using Visiting Speakers

Outside speakers can bring a new dimension to your education work. We do not recommend that you use outside speakers too often, but an interesting speaker can strengthen a course or study circle. Outside speakers should be used to fulfil a specific aim and be integrated into your activity in a structured way. Here are some examples of outside speakers you may think about inviting to the courses you organise.

Union officials. It is often useful to invite a union official to lead a discussion. S/he can take the opportunity to discuss union policy and also explain current issues that the union is negotiating or campaigning about. This will help the participants understand the difficulties the union faces in struggling for better conditions. You will also find that union officials will welcome the direct contact with members in an educational setting. From the participants' viewpoint, they will usually welcome the opportunity to get to know one of the union officials better.

Veteran leaders. Union history is often discussed in trade union courses. Most unions are created against a background of struggle and it is important that this is understood by a new generation of union members. One way of doing this is to invite a unionist who was involved in the early days of the union and who can talk about how the union was built. In the case of unions with a longer history, it may be useful to invite a unionist who was involved in a major struggle or successful union campaign.

Support groups - Resource centres. In many countries the union movement is assisted by support groups, who help the union with its work. This may be in the area of legal assistance, general information services, research or health and safety services. These support groups will be able to provide a speaker who could talk about a particular issue of interest.

Academics. Academic inputs to a study circle or workshop can be useful. A well designed and timed academic input can be constructive and helpful. It is important that you use academic speakers who are sympathetic to the trade union movement.

Management representatives. Not everyone agrees that management should be asked to participate in union education programmes. Inviting a management representative along can have some uses. It can expose your participants to the attitudes of management and what lies behind these attitudes. An open management may be prepared to bring useful information that you can work on during other parts of the course. If you are going to invite management to union courses it essential to think carefully about the aims of doing so. You also need to be confident that you and the union have overall control of the course and that you relate any management input to your overall aims.

These are just five examples of groups of people you may like to invite and you may be able to think of many more. As with all sessions, the aim is for the session to be as active as possible. This can be done by making sure that the speaker understands the education approach and that there is plenty of time allowed for discussion. One useful technique is for the participants to prepare a list of key questions beforehand to ask the invited speaker. This will help structure the discussion that takes place. Here is an example of such an activity that could be used if you were organising a study circle or workshop that met every week.

MODEL ACTIVITY:

Visiting Speaker

Aims

- To prepare for a visiting speaker.
- To practice questioning skills.

Task

Next week there will be a visiting speaker. A union branch official will lead a discussion on how members can be active in the union. Working together in your group, think of two questions you would like to put to the union official on this topic. Make a note of what you decide, as your study circle leader will wish to make up a list of the questions that are suggested by the groups. You should complete this task in about 15 minutes.



CHECKLIST**Using outside speakers**

- satisfy yourself that an outside speaker will add to the work of the course
 - make sure the speaker understands the issues s/he is dealing with and the time available
 - check that the speaker is aware of all the practical arrangements
 - brief the speaker on the participants, their interests and the education approach
 - if the speaker is an expert or academic make sure that they are sympathetic to the union movement and its aims
 - suggest the participants prepare a number of key questions in advance to help structure the discussion that will take place
 - make sure that the session is conducted in an informal and comradely manner and that there is a full discussion
 - think about how the speaker's contribution can be built into the course
 - ask the participants what they thought of the contribution, either at the next meeting or in the evaluation at the end of the course.
-

ACTIVITY**19****Using Speakers****Aims**

- To think about how to use outside speakers and to see what is involved
- To practice briefing an outside speaker.

Task

You are making plans to organise a course for health and safety reps. Select an outside speaker that you would intend to use and prepare a brief report, which says:

- why you have selected the speaker
- what main issues you want them to cover
- what you would tell the speaker before the course.

Field Visits / Workplace Visits

Field Visits. Field visits are visits to places of interest which are made by the whole study circle or course participants. Field visits will take a lot of organising and you will need to make sure that you have the time and resources to organise a successful visit. Your union may give you advice and support if you are thinking of carrying out a field visit. Before you organise a trip you should make sure that:

- the visit has a real educational aim, which cannot be met in other ways
- that you have the ability and finances to organise the visit
- that you have prepared the participants for the visit
- that you have thought about how anything learned on the visit can be considered in the remaining education sessions.

Field visits can be useful if they are well organised.

Workplace Visits. Workplace visits need special attention. The same general guidelines apply to workplace visits as general visits. In addition, it is useful to remember the following points.

- the workplace you visit should be appropriate to the needs of the course
- the purpose of your visit needs to be clear before you go and you will need to plan to get what you want from the visit
- you should make sure you have access to local union reps and members on your visit
- if you are looking at health and safety the workplace may have been cleaned up for the visit and you may not be shown the worst parts of the workplace
- you need to give the participants the opportunity to discuss and interpret what they have seen after the visit.

Films and Videos. Films and videos can add to the educational activities you organise. They can bring information and ideas into a course in a direct and interesting way. You may find that you lack the facilities and equipment to use them. If you do have access to these then you may like to see whether there are any useful films or videos available. Other educators will be able to advise you. Here are two examples of how aids can be used:

Video - international solidarity. A study circle in South Africa wanted to talk about international solidarity. The study circle leader was able to find a video, which dealt with workers struggling for union recognition in Central America. The struggle was violent and the video highlighted the importance of international support in such struggles. The video, which lasted for about an hour, was followed by a discussion on solidarity and how workers and the IMF could strengthen international solidarity.

Film - health and safety. A shop stewards course in India wanted to look at the problem of noise in metal shops. Many workers were having hearing difficulties. The educator was able to find a film, which dealt with noise in the workplace. The film showed how noise affected workers, how noise levels were measured and how noise could be controlled effectively. The film, which had been produced for the labour movement, dealt with these technical matters in a clear and understandable way. The screening was followed by a discussion on

what action the union could take to force management to take the problem seriously and reduce noise levels at work.

In both these cases it would have been difficult to deal as effectively with these issues without the film or video. These examples point to the strength of these aids. You will need to preview the film/video if you are thinking of selecting one to use in your own education activities. You will need to consider the following:

CHECKLIST

- does the film/video meet a specific educational need already identified by you or the participants?
- does the film/video take a union or workers' viewpoint?
- if the film/video deals with technical issues, are they explained in a clear and understandable way?
- is the length of the film/video suitable for showing in your course and allow time for discussion about the issues raised?
- if the film/video is too long is it possible to show a part of it and still meet the educational aims you have?
- what are the key points raised that need to be discussed or emphasised when summarising the education session?
- do you or any other participant have the confidence and skills to use the projector or video recorder?

ACTIVITY 20

Using Films and Video

Aims

- To think about the advantages and disadvantages of films/videos
- To practice arguing your case.

Task

Your tutor will divide you up into two groups of educators. The first group will think of arguments in favour of using films and videos and the second group against using them. The two groups will be given ten minutes to prepare arguments for and against. You will then be paired up with an educator from the other group to argue out the case between you. Your instructor will listen to the paired discussions and summarise the key arguments at the end of the role-play.

SUMMARY

In this part of the manual we have looked at activities that can be organised with the whole group. Most of your workshops or study circles will be made up of a balance between small group and whole group work.

- Managing discussion is one of the most important skills you will need to develop.
- Creative use of whole group activities will help to provide icebreakers and a visual alternative to speaking and writing.
- Using outside speakers, visits and films/ videos, will add diversity and interest if you select them well and build them into the workshop or study circle to encourage learning, reflection and action.

In the next part of the manual we will go on to explore how both small group and whole group activities can be brought together to structure a course, workshop or study circle.

SELF LEARNING ACTIVITY

Imagine you are going to run a session for an hour and a half working as whole group of twenty participants. Select a topic for the session. Read through this part of the manual and devise a plan for whole group teaching that will maximise participation. Use some of the techniques that we have illustrated here.





Developing Your Educational Materials

Introduction

In Part Six of the manual we will be looking at how you plan your own course, workshop or education sessions, based on an active learning approach. In the last two parts of the manual we looked at all kinds of different small group and whole group activities you might want to introduce into a course or workshop. In this part of the manual we will look at how these activities can be brought together to make a course or study circle programme. We will examine:

- how to identify educational needs
- developing aims for courses, workshops and study circles
- how to design a course or workshop
- how to link activities together in a learning cycle
- what to do at the beginning, middle and end of a course/workshop/study circle.

Whether you are putting together a study circle session, a workshop or a course you will be involved in some form of curriculum development. Other words used to describe this are course writing, instructional design, or materials development. From now on we will use the term materials development.

You may be using study circle material or education material supplied by your union and not be directly involved in producing materials yourself. It will be still useful for you to understand materials development as:

- it will give you a better understanding of the educational materials you are using if you know how they are designed and put together;
- you may need to add to the material you use to meet the needs of a particular group you are working with;
- you will pick up skills that will help you improve the current materials you are using.

Adult education and materials development

In this manual we have already discussed some basic ideas of adult education. Some of these

are particularly relevant to materials development. They include:

- That the starting point of any educational activity must be the learning needs of the participants. Participants will have expectations about any course or educational activity they enter into.
- That learning should start from the experience of the participants.
- That learning activities built around an issue are best understood if they go from simple to complex activities.
- That learning activities can start from participants' experiences, add new information and ideas, and develop a new understanding, which can then lead to action.
- That reflection and action (praxis) is a powerful approach to adult education.
- That adults want to learn things that are relevant and that they can apply in the real world.

ACTIVITY 21

Critiquing Your Education Materials

Aims

- To find out about whether your educational materials meet key adult education ideas
- To practice the skills involved in critically examining education material

Task

Working together in a small group of two or three participants, take some of your own educational material and see if it addresses the adult education principles we have just identified.

Prepare a short report on which principles are covered and which are not.

If you do not have any of your own education materials then your tutor will provide some for you to examine critically.

You will find that these key principles are useful guides to any materials development you wish to carry out. A useful way of assessing any material you have developed, or are using, is to ask whether it fulfils most or all of these key ideas.

Your platform as an educator

Research into how adult educators carry out curriculum development indicates that adult educators start with a platform. This platform represents beliefs and values about learning and how to organise learning. In this manual we suggest, for example, that active learning is the most suitable approach to take. We also suggest that the courses, study circles and workshops are based on union values and these two are connected. We suggest that union values and an active learning approach are parts of your platform as a union educator. To think more about how this platform may determine what you do, and what material you might produce, carry out the following activity in pairs:

ACTIVITY 22

Approaches to Health and Safety Education

Aims

- To think about how who you are may influence what material you produce.

Task

Turn to the person next to you on the course.

One of you should write down the kind of approach and priorities a union educator would use in developing a 3 day course for union safety reps.

The other group member should write down the kind of approach and priorities a human resource manager would take in developing a 3 day course for workshop supervisors on health and safety.

Take five minutes to work on this and then compare what each of you has identified.

If the approach is different why do you think this is?

A staged approach to materials development

You may find it helpful to think of materials development as a series of stages. We would suggest dividing the process up like this:

1. Identifying educational needs
2. Developing a set of educational aims and evaluation tools
3. Deciding on content and methods

Deciding content and method is the most complex stage and we suggest two approaches:

- A number of techniques aimed at defining the scope of the course and the topics you might include. These techniques are: **brainstorming, chunking, developing a union approach** and **draft timetabling**.
- Some overall ideas to think about in constructing the starting of a course/ workshop or study circle, dealing with the main issues/ topics and finishing the course /workshop or study circle. These include **building in opportunities for reflection** and **dealing with topics in a cycle of cycle of introduction, analysis and action**.

IDENTIFYING EDUCATION NEEDS

Union education course should meet the real education needs of the target group they are aimed at. The educational needs of a group can be identified in a number of different ways:

- by asking the group themselves what their educational needs are,
- by asking experienced members of the union about the needs of a particular group. Union reps, for example, could be asked about the education needs of the members,
- by finding out whether the union has identified these needs in the past through research, needs analysis, or when organising similar courses,
- by asking experienced educators about the needs of a particular group,
- by looking at union education policy to see whether there are any general or specific requirements that you need to build into the course.

The education needs of a target group will not be static. Changes in the law, union organisation or management strategies will all mean that the education needs of unionists will need to be updated from time to time. If, for example, new health and safety legislation is introduced, then health and safety reps will need to know about these new laws and the rights they contain. Union officials will also need to know about the new laws and how they might affect union organisation.

Specific needs of a group

There will also be changes in needs between different groups, related to specific circumstances. Here are three examples:

- You are organising union reps training at a large engineering plant. The branch committee is relatively inactive. The members don't get involved much in the union and during a recent national union campaign the local branch failed to support the campaign in any way.
- There are an increasing number of women entering your industry and they are not very active in the union. Your union has strong local union committees, but very few women are participating.
- You are organising some health and safety training in your region. In one foundry, the safety reps you are training are elected by the union, purely as safety reps. The branch feels that safety and health is so important it should be dealt with by elected reps who

only focus on safety and health issues. In another metal shop, the local union decided to make the union reps safety reps, to avoid duplication.

- You are training member educators or study circle leaders from a large car plant and the workforce has a high proportion of migrant workers, who don't speak the host country language well.

Even where you have identified the general educational needs of a target group there will always be examples of specific needs like these. You will need to adapt your material and the emphasis you place on different parts of the course to cater for this. As a union educator, you will need to review and update the education needs of the groups that you work with and make sure they meet current circumstances.

ACTIVITY

23

Meeting Changing Needs

Aim

- To think how you might go about updating the educational needs of the participants on the courses you facilitate.

Task

Working together in your group exchange experiences about the groups of unionists you are involved in delivering education to.

Select one of these groups and prepare a brief report on a flip chart / ohp that indicates:

1. How their educational needs have been identified in the past.
2. What factors might cause these educational needs to change in the next 2/3 years?
3. What measures could you practically take to identify any changes in this group's educational needs?

Notes

SETTING EDUCATIONAL AIMS

Once you have found out all that you can about the educational needs of the group you will be working with, you will need to develop a series of aims for the course, study circle or workshop. A clear set of aims will help you with developing your material. Educational aims will be based on both the needs of the union and the participants. These aims will:

- help you to be clear about what you want to achieve,
- be able to be broken down into more specific aims when dealing with a particular issue or subject area. This will help you with your material development,
- be able to be used at the beginning of a course or study circle to obtain a consensus about what is to be covered,
- be a useful evaluation tool as they can be used to measure whether the course has achieved what it set out to achieve.

There is often confusion between the terms "aims" and "objectives". Usually aims are used to express the overall purpose of a course, while objectives is the term used when an overall aim is broken down into smaller components. Experience indicates that people often interchange the terms and do not use them precisely. In this manual we will use aims as a term to describe the main learning objectives of a course, study circle or workshop.

Examples of course aims

Here are some examples of the aims of particular courses taken from different union education programmes.

EXAMPLE ONE

Union Organisers / Activists Course

Workshop Aims

The Aims of this Workshop are:

- To motivate participants to create a recruitment and organising culture at the workplace and in the community.
- To help identify organising issues in the workplace which can be used to recruit new members and activists
- To update and develop the skills and knowledge required to organise effectively including:
 - Communications skills
 - Influencing skills
 - Interviewing skills
 - Campaigning skills

To help participants develop a team approach to organising.

EXAMPLE TWO

Health and Safety Workshop for Study Circle Leaders

This workshop has been designed for participants who have been trained as study circle leaders. It has been organised with the aim of providing participants with the background information and training necessary to lead study circle programmes on health and safety issues. As a result of the training received, participants will have acquired the knowledge and skills to become effective union safety reps. By the end of the workshop, participants should be able to:

- understand why unions and their members should be concerned about health and safety issues;
- recognise and tackle health and safety hazards facing textile, garment and leather workers;
- identify areas of priority action on the part of trade unions at national and plant level;
- organise and co-ordinate worker health and safety representation at the workplace;
- undertake an effective role on health and safety committees;
- understand the relevance of national legislation on health and safety;
- develop collective agreements on health and safety issues;
- plan and run study circle sessions on health and safety issues.

Preparing your own aims

Preparing your own aims is an important skill. You will find that it will help you think clearly about the course that you are going to organise. It will also assist you when you come to put the course activities and materials together. You can see from the above examples that there are different kinds of aims. Activity twenty four will help you think how they differ and help you write your own aims.



Agreeing Aims

Running a course democratically means involving participants directly in decisions about the course and how it is organised. A good way to start is to agree the aims and programme. This will give participants the opportunity to comment on the relevance of the aims and to make some of their own suggestions about the course. Here is a brief activity that you could use at the start of any course.

MODEL ACTIVITY:

Agreeing Our Aims

Aims

- To agree the aims of the course
- To decide on the programme for the course.

Task

Working together in your group, look at the aims of the course you are about to participate in.

Discuss whether you agree with the aims and decide whether you think the aims should be modified or added to.

Then consider the programme and timetable and suggest any changes or alterations you think are appropriate.

If you do suggest changes then you will need to state why you think the changes would be beneficial.

An activity like this will encourage participants to feel that they share the responsibility for the course with the educator or facilitator. You should be prepared to listen to sensible suggestions and ideas and modify the course in line with these suggestions. If participants come up with unreasonable expectations then you will need to explain why these can't be met.

Aims and evaluation

Often when people design a course or workshop, the last thing they decide is to design some form of evaluation. It is better to start thinking about how you might evaluate your course or workshop at the beginning, when you are setting up the aims and also as you develop the course material. Evaluation is best considered as a cycle which starts from setting the aims of the workshop, course or study circle, is used during the workshop at times by reflecting on what has been learnt and is considered at the end of the course. Results of evaluations can then be reflected on themselves to modify and improve future course aims and content.

You will find some ideas on how to build in mechanisms for participants to reflect on their experiences later in this part of the manual. A thorough discussion of evaluation and the tools you can use appears in Part Eight of the manual.

Deciding on content and methods

Deciding on the content and methods of a course, study circle or workshop is a complex task. It will be made easier if you have a clear idea of the educational needs of a group and

that you have defined the aims or learning objectives. It can also be made easier by some techniques used in adult education.

Brainstorming. Brainstorming the contents of a course is a useful way to start.

Brainstorming is best done by a small group of people. These groups can be made up of educators, some representatives of the target group and any specialist people.

Brainstorming the content of a new health and safety course might include groups of educators, one or two experienced safety reps, the union health and safety officer and someone from a health and safety NGO who works closely with the unions.

Brainstorming will produce a list of ideas that can then be worked on further to develop a possible content.

Chunking. Chunking is a technique where a wide variety of subjects or issues are placed into manageable blocks or chunks. If, for example, 20 or 30, items have been identified by a health and safety brainstorm it may be possible to divide them into four or five chunks of information. For health and safety this might include general topics like:

- Workplace Hazards
- Health and safety law
- Union health and safety organisations
- Accidents and workers comp
- Negotiating with management
- Materials handling problems.

Chunking will give you an idea of the main topics you will need to deal with and prepare materials for. These main ideas will then need further work and refinement. You may revisit some of these topics and break them down further. Hazards of the workplace might break down into sub categories such as chemical hazards, materials handling, noise etc.

A union approach. Brainstorming and chunking can be useful but are seldom enough in themselves. They can sometimes produce technical chunks of knowledge and miss out a political or union perspective. One useful discipline is to ask a basic question.

What is the union approach to this subject?

Unions have for example developed an approach to health and safety as more has become known about the hazards of the workplace. A typical union approach is that:

- workers have a right to know about the hazards they are exposed to
- employers should focus on providing a safe system of work and not blame workers for accidents
- workers should be able to elect safety reps who have independent powers to monitor the workplace
- management should focus on real solutions to the control of hazards like changing the process or enclosing it in some way, rather than relying on providing personal protection for workers
- union members have the right to refuse dangerous work.

If you are designing a health and safety course you would need to integrate this approach into most topics you deal with and make it a main theme of the course.

Timetabling a Course / Study Circle / Workshop. Once you have decided on the main topics you are going to deal with in a course or workshop it may be an idea to attempt to develop a **draft timetable**. This will give you a sense of how much time you might have for different topics.

When completing your draft timetable you will need to think about:

- the need to set the tone for the Study Circle / Workshop at the beginning and introduce the democratic, active approach;
- the need to develop a timetable where issues and topics are sequenced in a logical order;
- giving participants space to reflect on what they have learnt and how they might use this new understanding/skill;
- developing learning cycles which start from people's experiences, introduces new ideas and topics and result in action. This learning cycle should apply to the course as a whole and to individual topics;
- avoiding overloading the programme and trying to do too much;
- the need at the end of the course to focus on putting into action ideas and strategies that have been developed throughout the workshop/course/study circle;
- the need to evaluate what has been achieved and measure this against the aims of the workshop/course/study circle.

Starting the Course/Workshop/Study Circle

Starting the course/ workshop/study circle in the right way is important. When starting a course you should be seeking to:

- set the tone for the course and make participants feel relaxed and feel positive
- explain the educational approach taken
- involve all the participants in an icebreaking activity as soon as possible
- demonstrate at an early stage that the participants will be involved in decisions about the course and how it is run
- agree the aims and programme for the course with the participants.

We have already looked at how to agree aims. Here is a model activity for starting a workshop/study circle or course.

MODEL ACTIVITY:

Getting to Know Each Other

Aims

- To get to know each other in the study circle
- To identify what you want to get out of the study circle

Task

Your study circle leader will ask you to interview another member of the circle. Find out from this colleague:

- his/her name
- how long they have been a union member
- how active they are in the union
- where they work and what they do
- what they hope will be discussed during the study circle.

Your partner will then interview you in the same way.
Take some brief notes so that you can introduce your partner to the study circle.

ACTIVITY
25

Starting a Workshop

Aims

- To think about different ways of starting a course.

Task

Working together in pairs, describe to your partner any icebreakers or starting activity you have experienced on a course or workshop.

Explain what happened and how successful you thought it was.

Notes

Reflection during the course / study circle / workshop

Another idea that you can consider at the beginning of a course is to introduce the idea of reflecting periodically on what has been learnt so far.

Reflective activities

It is useful to build space into a course for participants to reflect on their own experiences and what they have learnt. This can be done in a number of ways. You could for example:

- at the end of each day, leave time for a discussion about what key lessons or strategies had been learnt or developed. This discussion could also look at how these key lessons could be turned into action.
- at the beginning of a day or study circle meeting, you could ask individuals to reflect on what they had learnt the previous week or previous day and make a note of this.
- you could divide participants into pairs to discuss key ideas they had learnt and to share these ideas.
- you could suggest that at the end of each day, or at regular intervals, there is a workshop meeting to discuss progress so far and agree what to look at next.

Workshop meetings

Workshop meetings are a more formal and lengthier approach to reflection and action. Typically a workshop meeting will be organised either at the end of a day or alternatively at the beginning of the day. A course participant will chair the workshop meeting and another participant will be elected to act as secretary. The tutor or facilitator will assume the position of advisor to the Committee or just be a member of the committee. The kinds of things a workshop meeting can consider are:

- to evaluate the effectiveness of the day's teaching
- to modify the programme for the next day/s
- to share out organisational tasks amongst the participants/facilitators
- to take up any administrative issues that has arisen with the course arrangements.

If you are going to organise regular workshop meetings during the course then here are some suggestions:

- make sure you timetable enough time into the programme for the meetings to take place;
- encourage participants to be disciplined in carrying out the meeting within reasonable time constraints. The meeting should be limited to 30 minutes;
- suggest that each time a meeting takes place a different chair and secretary are elected;
- make sure the decisions made by the meeting are recorded in some way. You could ask the secretary to produce brief minutes of the meeting;
- recognise that regular meetings will be evaluating the course as it proceeds. This will be helpful when you come to evaluate the course at the end.

Workshop meetings are a natural development of the methods used. They are a practical way of practising democratic skills and ensuring participants feel that they can jointly influence the workshop. They can also provide valuable support to the educator in sharing out responsibilities and organisational tasks.

The main parts of the course

To put together the main parts of the course you will need to break down the course into a number of topics or issues. You can then design education activities to examine these issues. One way of breaking down a topic is to think of activities in three stages.

Introduction. In this introductory stage you will be designing activities that introduce the topic. This may include activities on attitudes or reviewing what participants know about the topic. They will usually start from participants' experience and build from this experience.

Analysis. In this stage you will be exploring in depth the information that participants need to know about the topic. You may be designing activities that ask participants to:

- analyse problems
- find out about labour laws and regulations, bargaining agreements
- find out about their rights
- find out about technical subjects, such as health and safety hazards.

Action. In the final stage you will be encouraging participants to put this information in to use in some way. You will be designing activities that are concerned with:

- building union strategies and campaigns
- negotiating improvements with management
- strengthening union organisation
- building links with the community and other organisations.

Here is an example of some linked activities for a day spent teaching union reps about health and safety which uses the **Introduction, Analysis, Action** approach.



EXAMPLE**Linked activities: Dealing with chemical hazards**

This example is of a five-day health and safety course for safety reps and describes three activities that might be used as a basis for the day to be spent on dealing with chemical hazards.

Introduction. A small group activity is introduced which consists of a series of statements which groups have to agree or disagree with. By debating these statements participants will begin to articulate a union approach to health and safety. The report back from the groups is in the form of a managed discussion.

Analysis. A small group activity is introduced where participants work in small groups to research a particular chemical hazard. The chemicals they choose to research are preferably ones their members may be exposed to at work. They asked to prepare a short report on

- the effects of the chemical
- whether there are any permitted exposure limits
- how these limits can be measured
- how the chemical hazard can be controlled in the workplace.

This research is carried out by participants referring to materials data sheets and reference books. The tutor provides advice and assistance.

The report back is in the form of a role play of a union safety and health committee meeting which considers the reports of the hazards from the small groups. Once the reports have been made, the committee discusses a list of demands to make to management to ensure no union members are exposed to risk.

Action. A small group activity is introduced where participants review what information they are given of chemical hazards in their own workplaces, whether the workplace has been independently monitored, and what powers the union and members have when faced with chemical hazards. After this review, the groups are asked to develop a strategy to improve current arrangements and strengthen the union's involvement in dealing with the hazards of the workplace.

Building a timetable around linked activities

Starting with a number of linked activities using the introduction, analysis, and action approach is a useful way of defining how to deal with a topic. It will need some further work to turn into a full day's plan. Here is a more comprehensive plan using the three activities as the core.

- 9.00 Introduce small group activity of controversial statements and take reports
- 10.00 Reinforce a union approach to health and safety by making an OHP presentation of union policy on safety health and the environment. Hand out a summary of union policy at the end of the session

10.30 Break

- 10.45 Show 30 minutes video on chemical hazards which illustrates how chemicals can harm the body, setting limits for chemical exposure and the how chemical hazards can be controlled.
- 11.15 Introduce main activity on researching chemical hazards, using materials data sheets and chemical reference books.

12.30 Lunch

- 1.30 Continuation of researching chemical hazards activity
- 2.00 Organise report back from group work, as a union safety and health meeting to discuss what strategy should be adopted to deal with the hazards.
- 2.30 Close role play and hold an open discussion on what has been learnt

3.00 Break

- 3.30 Introduce small group activity to review chemical hazards at the workplace and develop a strategy for union involvement and the enforcement of membership rights to a safe workplace.
- 4.30 Conduct a managed discussion that focuses on key union issues:
 - the right to know about hazards
 - the right to union monitoring of the workplace
 - the right to refuse dangerous work

Relate this discussion to how the participants can bring about change through the strategies they have developed.

This example shows how group work can be reinforced by presentations, videos and managed discussions to enhance learning and help bring about change. The core of the days learning activities is built around the introduction, analysis, and action linked activities idea.

ACTIVITY 26

Linking Activities Together

Aims

- To practice planning linking activities together

Task

Working together in your group, draw up a plan for dealing with a main issue on a workshop or study circle.

Using the introduction, analysis, action approach to plan a series of activities that will introduce the subject, help participants find out more about it and plan what to do with the information.

Indicate in your plan the aims of each session, the activities you would use and the resources you would use.

Finishing the Study Circle / Workshop/ Course

Future Plans

For union education to be effective it must seek to change things at work and in the community. It can do this partly by improving the skills of unionists. It is also important that participants plan together to bring about improvements. Here are some examples.

- During a health and safety course for safety reps it became clear that a company was not providing proper information on certain chemical hazards. The union reps drew up a strategy to force management to disclose information on the chemicals used in the workplace and the hazards associated with them.
- A course was organised for union reps from different factories in a region. During the course they compared the different wages and conditions at the workplaces represented. These differed widely. At the end of the course the union reps agreed to exchange this kind of information on a regular basis through an informal network.
- A women's union course explored why women were not more active in the union. At the end of the course they drew up a list of actions that the union needed to take to remove barriers to women's involvement in union activities. They decided to send this to the national executive of the union. They also decided to form a network of women activists to develop a strategy to break down some of these barriers.

One way to make sure that the ideas discussed during a workshop feed into action in the world

beyond is to draw all these ideas together at the end of the course. This can be done by participants drawing up future plans. Here is an example of an activity you can use for this purpose. The example is of an activity designed to be carried out at the end of a five-day workshop for union reps.

Participants will find it easier to draw up these plans if you have recorded ideas for change during the workshop. This could be done by the minutes of workshop meetings or by keeping the key flip charts/summaries the workshop have used.

MODEL ACTIVITY:

Future Plans

Aims

- To review the ideas for change that have been discussed during the workshop
- To make plans to for improvements at work, in the union and in the community

Task

Working together in your group review what you have learnt during the course and the ideas that have been put forward.

You will find the aims of the course and the programme a useful guide.

If you have been producing minutes of workshop meetings then these will be a useful resource for this activity.

Present your ideas as a plan of action under these headings:

- improving the links with your members
- improving your union organisation at work
- improving your local collective agreements
- improving your links with other unions
- improving your links with groups in the community



SUMMARY

In this part of the manual we have looked some of the basic ideas of materials development. This has included how to design course/ workshops or study circles base on educational needs and the importance of a clear set of aims and methods of evaluation.

The difficult task of developing content and materials can be made easier if you:

- use techniques like brainstorming and chunking;
- build a union approach to a topic;
- provide space for reflection;
- break down topics into introduction, analysis and action stages and prepare activities for each of these stages;
- add to this framework of group activities with presentations, managed discussions, videos etc which seek to reinforce learning and promote action.

Finally we suggest you use the end of your course / workshop / study circle to capture the ideas that are concerned with action and change and help your participants develop plans to bring these about the future.

SELF LEARNING ACTIVITY

Select a course, study circle or workshop that you want to develop and plan the aims and content for the educational activity that uses the techniques and ideas we have suggested in this part of the manual. If there is a large amount of material for you to prepare, you may find it useful to carry out a number of the small group activities as individual activities.

If you don't prepare your own material then it may be useful to take some existing material and see whether it can be improved by any of the ideas we suggest to develop your material. You may, for example, look at the order you deal with subjects or realise there are some gaps that need to be filled or sessions rewritten.





Planning and Organising Your Educational Activities

Introduction

In this part of the manual we will look at what is involved in planning and organising your education activities successfully. This will include:

- how to plan an education session
- how to plan a course, workshop or study circle
- the practical arrangements you will have to make to organise education activities

To be an effective educator you will need to plan your activities well. This will ensure the basic ingredients of participants, materials and educator/s are brought together in a meaningful way. In most unions, education opportunities for your reps and members will be infrequent. Effective planning will help maximise the benefits to both the participants and your union. Making best use of scarce resources is one of your main aims as a union educator.

Planning your Education Activities

Good planning is important whether you are running a single education session, organising a one-day course or putting together a study circle programme or five day workshop. You will find that the same basic principles apply to all these different levels of education activity. To explore what is involved in planning effectively, we will look at planning an education session and then go on to look at planning a course, workshop or study circle. Planning is closely connected to materials development, which we considered in Part Six, but is not the same thing. In the case of a basic course for union reps, deciding on the materials to use may happen well before a course actually takes place. Planning for a particular course will need to take place in advance of every course that is being organised.

Bad planning may lead to:

- the wrong people being recruited for a course
- an overcrowded agenda which can't be fulfilled

- an inability to meet the needs of a particular group
- poorly designed sessions
- badly resourced sessions.

Planning a session

Planning an education session is one of the most common tasks that you face as an educator. A good education session will need to be planned in advance because:

- you will need to have a clear idea about the aims of any session
- you will need to select a suitable activity or manage a discussion that will meet these aims
- you will need to plan the timing of the session
- you will need to identify and collect the resources you will need to carry out the session
- you may need to make special arrangements in advance, if for example, you are using a visiting speaker
- if the session is part of a course or study circle you will need to link up the session with previous or future sessions.

You will find that the time spent in planning a session is a good investment, as it will ensure the education session is well prepared and more likely to be effective.

Selecting an educational activity

Your first task will be to select a suitable education activity or activities for the session. When you select an activity for an education session you should make sure that:

- it will fulfil the aims of the session
- the activity can be completed in the time available
- that you can provide adequate resources to carry out the activity
- it will help the participants explore a relevant issue
- the activity can be integrated into the course as a whole.

If you are using a speaker or a film or video in a session you will still need to have aims for the session. You will also need to think about which points to cover in general discussion. Remember that you can always run a small group activity following a speaker or film to focus on the issues raised.

Timing a session

The timing of a session is important. If the session is overloaded then things will be rushed and participants may feel that they have not made a full contribution. If there is not enough to do then the session may become aimless and repetitive. Estimating the timing of a session will help you with your planning. When you are working out the timing of a session you will need to:

- allow sufficient time at the beginning of the session to introduce the aims of the session and the issues to be dealt with
- if you are going to use a small group activity or whole group activity estimate how long it will take to introduce the activity, carry out the group work, report back to the course and summarise any key points
- allow enough time to summarise the whole session. This should include time to reflect on the value of the session and decide on any action that needs to be taken
- allow enough time to agree and prepare for the next session.

Timing an activity

In order to time a session you will have to work out how long any activity you are using will take. It may be useful to look at an actual example. Let's take for example the model activity "getting to know each other" on page 103 of the manual. This model activity is designed to get everyone talking straight away and help the study circle or course get off to a good start. Activities like this are sometimes called "icebreakers". The timing for an activity like this, assuming there are sixteen participants in the course/study circle, would be:

Introduction of Activity	5 minutes
Participants: Interviewing each other	20 minutes
Report Back: Introducing each other to the study circle	45 minutes
Total estimated time of activity	70 minutes

You will notice that in this activity the report back is the lengthiest part of the activity. This is because the activity is designed to let everyone get to know each other and leaves space for people to ask questions about each other. This kind of activity often takes longer than you might think.

Session planning forms

One way of planning a session is to use a session planning form. This will bring together the aims, subjects/issues, methods, timing and resources you will need. Here are examples of two model sessions taken from a study circle programme for members and activists. The first example is the planning form for the first session of a study circle and the second is a session on health and safety that would take place during the study circle, probably in one of the middle sessions.

Opening Session of the Study Circle

Aims of the Session

- to introduce participants to each other and establish a relaxed and informal atmosphere in the circle
- to identify the aims of the study circle and the issues to be dealt with
- to prepare for the next study circle session

Session Plan

Subject/Issues	Method	Time
Introductions	Paired introductions	70 minutes
Aims of Study Circle/ agreeing programme	Open discussion led by Study Circle Leader	30 minutes
Summary of opening session	Key points underlined by Study Circle Leader	10 minutes
Preparation for next session	Outlines issues for session 2	5 minutes

Materials/Resources

You will need:

- sixteen copies of the “Getting to know each other “ activity
- a draft study circle programme
- 16 copies of the study circle book.

General Session on Health and Safety**Aims of the Session**

- to identify the main health and safety hazards that members face at work
- to discuss what members and the unions should do when faced with these hazards
- to discuss a union approach to health and safety at work

Session Plan

Subject/Issues	Method	Time
Hazards at work	Review results of Discovery Exercise set previous week	30 minutes
Responsibility for Safe Workplace	Case Study Activity	60 minutes
Summary of Key Points	Key Responsibilities of Managers/members Outline union approach to H/S	25 minutes
Preparation	Outline issues for next session for next week	5 minutes

Materials / resources

You will need:

- 16 copies of case study activity
- information/articles on hazards in the metals industry
- the study circle book (which includes a section on the union approach to health and safety).

ACTIVITY 28

Planning an Education Session

Aims

- To think about what is involved in effective planning
- To prepare an education session effectively

Task

Working together in your group select a topic for an education session that you wish to carry out with a particular target group.

Discuss your aims for the session, the education activities you would use, the resources and the timing for the session.

Complete a planning session form for the education session.

You may find the two model sessions a useful starting point.

Organising your course or workshop

Once you have designed your workshop there will be many practical arrangements that you will have to make. For this reason it is best to prepare your programme and activities well before the start of any course or workshop. The practical arrangements you will have to make may include:

- recruitment of participants
- providing education activities/resources
- selecting a suitable venue
- providing accommodation
- arranging transport
- checking equipment
- arranging speakers
- finance and budgeting

Here is a checklist of things you may find useful if you are organising a course, study circle or workshop.

CHECKLIST

for a course, workshop or study circle

Recruitment

- have you advertised the course/ workshop effectively?
- have you taken steps to encourage women to participate? (targeting, provision of child care, crèche etc., timing of the course)
- do you have to take special measures to recruit other groups? (young members, new reps)
- do you have a system for dealing with too many applicants?
- have you written to employers in advance to request the release of participants?
- do you need to deal with cases of release for training being refused?
- have you written to participants in advance giving them the full details of the workshop?
- do these details include information of allowances/expenses, lost shift payments etc.?

Education materials/resources

- do you have enough copies of the educational materials you have planned to use?
- do you have sufficient resources to carry out these activities?
- does this particular group of participants have any specific needs you can identify in advance to prepare additional activities?
- have you requested participants to bring resources with them about their workplace/community that they will need? (e.g. local agreements, details of health and safety hazards etc.)
- have you pre-screened any films /videos you intend to use?
- if you are using outside speakers have you confirmed the arrangements? (address, time, payment, etc.)?
- have you briefed the outside speaker/s concerning their contribution/ needs?

Venue

- have you found a suitable venue that is within any budget you may have and in a central location?
- have you checked the size of the teaching room, the availability of extra rooms for group work, screening etc.?
- are the tables and chairs adequate and can they be arranged in away that suits the methods you are using (e.g. group work)?
- is the lighting and ventilation adequate?
- do you have access to power points if you need them?
- will you have access to photocopying, typewriters, and computers if you need them for the course work?
- will you be able to carry out the workshop without being disturbed by other groups?

Equipment

- have you made a list of the equipment you will need? (e.g. flip charts, white/ blackboard, OHP, video equipment, projector etc.)
- have you checked the availability of this equipment at the venue and if it is not available where you can hire it from?
- have you checked that equipment provided works as it should?

Accommodation and food

- if the venue is providing food (meals and breaks) have you checked the costs against the budget?
- can they respond to any special dietary requirements?
- is the accommodation adequate and within the budget?
- if the accommodation is to be shared to reduce costs do participants know this in advance?
- do you need to check the accommodation for disability access?
- if the accommodation is not at the teaching venue have you checked the travel arrangements between the two?

Transport

- do you have to make any travel arrangements for participants?
- if participants are making their own travel arrangements do they understand how and what they can claim?
- have you given participants directions, route maps or travel options?

Budget and finance

- have you drawn up a budget for the workshop?
- is the budget agreed with the union/donor?
- do your arrangements mean that the budget will not be exceeded?
- have you checked with your union how bills should be paid?
- will you have any cash requirements and have you arranged to draw out any money you will need?
- do you understand the reporting requirements you will be responsible for?

Sharing the Load

It can be seen from the length of the checklist that organising a course or workshop involves many things. You should try and get as much support as possible from your union, other educators and friendly NGOs. This will help you share the load.

One thing you need to watch out for, once a course has started, is the conflict that often arises between your teaching commitments and the administrative tasks that are needed. You can encourage participants to take responsibility for some aspects of administration to help with this. Staff at the venue may also be able to assist. You can also plan team teaching sessions, which will help you and give the participants more variety.

SUMMARY

In this part of the manual we have looked at planning your education sessions and programmes. However good your material and delivery is, course and workshops can fail if they are not planned well. We have looked at what is involved in planning a session and also suggested a checklist for planning a workshop or course. We have suggested that you might like to share the planning load with other union activists or course participants.

SELF LEARNING ACTIVITY

One

The next time you have to teach a new session draw up a session planning form for the session. After you have run the session reflect on the experience and whether you were able to stick to your plan.

Two

Examine the checklist for organising courses and workshops. Tick off the points you most have difficulty with. Select one or two of these problem areas and try and come up with some solutions to these problems. Discuss your ideas with others in the union who may be part of the problem or may be able to help you solve the problem.



PART
EIGHT

Evaluation

Introduction

In part eight of the manual we will be looking at how to evaluate your courses, workshops and study circles. Effective evaluation of the union education programmes you are involved with is an important part of your job as an educator. We will be looking at:

- The reasons for conducting evaluations
- Who is interested in the results of any evaluation exercise and why
- The relationship between evaluation and reflection
- Different ways of evaluating your courses and educational programmes
- What is evaluation?

Evaluation is an attempt to judge the value of an activity or event. Mary Thorpe (1998) from the Open University in the UK has suggested the following definition:

“Evaluation is the collection of, analysis and interpretation of information about any aspect of a programme of education and training, as part of a recognised process of judging its effectiveness, its efficiency and any other outcomes it might have“

This definition is useful because it includes the idea that evaluation looks at what **actually happens** and not what **is meant to happen**. This is an important distinction if you wish to evaluate your union provision effectively.

Why carry out evaluations?

There are a number of reasons why you or your union need to evaluate courses, workshops or programmes:

- To assess the effectiveness and relevance of the union education you are carrying out. What knowledge, understanding and skills have been learnt?
- To give you information to help improve your union education provision.

- To give your participants the opportunity to say what they think about the education they have been involved in.
- To make the best use of the scarce resources that union has for educating its officials, union reps and members.
- To examine the link between your education programmes and change at the workplace and in the community.

This last reason is particularly relevant for union education as we have already seen that one of the main aims of union education is to improve the workplace and the community. We need to collect evidence whether or not this is happening.

Who is interested in evaluation?

Your participants

Your participants will be interested in saying what they think about the union education they have been involved in and will generally welcome an opportunity to do this. As we shall see later, it may be useful to give them an opportunity throughout a course or programme and not just at the end of the course or programme.

You, the educator

As a union educator you will be interested in evaluation, because it will tell you how the education you are facilitating is being received and how effective it is. The results of an evaluation may also give you information that can be used to improve future courses and programmes. They will also give you an opportunity for self reflection.

Your union leadership

Your union leadership will be interested in evaluating courses, workshops and programmes for a number of reasons.

- They will want evidence that scarce resources are being well spent
- They will be interested in whether the education programmes are really resulting in more effective representation of members
- They will be interested in whether the education programmes are dealing successfully with union policy and current union campaigns.

One of the things to think about when you are designing evaluation tools is the different stakeholders who will have an interest in the results of the evaluation exercises you are planning. It may be useful to involve them all in the evaluation design process.

Reviewing your experience of evaluation

Before considering the different techniques of evaluation it may be useful to reflect on what kind of evaluation tools you have used and how useful they have been.

ACTIVITY

30

Reviewing Your Experience of Evaluation

Aims

- To reflect on your experience of evaluation
- To explore the range of different evaluation tools that course members are familiar with

Task

Working together in your group compare your experiences of attempting to evaluate the education activities you have organised. Discuss what type of evaluation tools you have used and whether or not they were effective. Prepare a brief report on the experiences of the group to present to the workshop.

If any group members have not used evaluation tools themselves they may wish to refer to any experiences they have had of evaluation as a participant and how effective they felt this was.

Some common terms used in evaluation

Formative and summative evaluation

Two of the terms that are commonly used to describe different kinds of evaluation are **formative** evaluation and **summative** evaluation.

Formative evaluation is concerned with the collection of information of data that will be used to change a course or programme, while it is in progress. If you were running a new five day workshop, for example, you may decide to introduce an evaluation exercise half way through the course. Your aim would be to review how the course is going and see whether there is any need to change the remaining timetable and course material. If you were running a new study circle programme you may run a pilot course or number of pilot courses to test out the material and teaching methods before finalising your material.

Summative evaluation is carried out at the end of a course or programme, once it is completed. As its name suggests, summative evaluation sums up the teaching and learning experience. Summative evaluation may include the measurement of outcomes, impact and cost effectiveness. It may also be described as being concerned with accountability.

Although described differently, the two types of evaluation are closely linked. A summative

evaluation in most cases would include information and data that are collected in the formative stage. If a course is relatively new the summative evaluation may be used to change or adapt future courses.

The distinction is useful for educators because you can ask yourself whether you have included both types of evaluation tools. It also reminds us that evaluation is not just something that happens at the end of a course or programme, but is part of a continuous process.

Quantitative and qualitative evaluation measures

Two other terms that are often used when discussing evaluation are quantitative and qualitative measures.

A quantitative measure is simply one that can be analysed statistically or quantifiably. If, for example, you decided that all participants in a particular course completed an evaluation form which asked them to rate a number of aspects of the course on a scale of one to five, you would be collecting information that was quantifiable. At the end of a year or other set period you could analyse the forms and find out, for example, on average how each of these aspects had been judged by all the participants that had taken the course. Quantitative measures are often useful to evaluate the technical aspects of a course or workshop, such as accommodation, resources, working environment etc.

Qualitative measures are those that seek to look at the experience of the education event. What was it like participating in the course? Here instead of asking participants to rank aspects of the course you might ask such questions as;

- What were the most useful aspects of the course to you?
- Did you find any parts of the course not relevant to your job as a union rep?

Adult education specialists suggest that that both the quantitative approach and the qualitative approach have their merits and may be needed for different aspects of a programme. Some have suggested that quantitative approach is concerned with the question Have the goals been achieved? The qualitative asks more openly - What has been going on? As a union educator you will be interested in both issues.

Open and closed questions

Another way of looking at this kind of evaluation is to think about open and closed questions. An open question will encourage the participant to think about the question and write a considered response. A closed question encourages the participant to simply answer yes or no and limits the information you will get in response. You may be familiar with open and closed questions in facilitating workshop discussion. An open question will facilitate dialogue while closed questions will tend to end the conversation.

If you look at evaluation form a on page 106 for example you will see the first question asked is:

- Do you feel the aims of the workshop have been met?

This is a closed question, because most participants will answer either yes or no. The important point here to note that is that designing the right questions is an important skill to

practice. A well designed question will give you useful information and a poorly designed question will give you poor information. It is important to test out an evaluation form to see how effective it is in giving you and others the information that is needed.

Evaluation Forms

Here is an example of two typical end of workshop evaluation forms. Example a is mainly concerned with qualitative responses and example b mainly concerned with quantitative responses.

Workshop evaluation form: **example A**

Aims

- To evaluate the workshop/course
- To suggest improvements for future workshops/courses

Task

Reflect on the workshop you have just participated in and answer the following questions:

1. Do you feel that the workshop aims have been met?

2. What parts of the workshop have you found most interesting?

3. What parts of the workshop have you found least useful?

4. Are there any important topics/issues that have been left out?

5. What comments do you have on the facilities?

6. What improvements would you like to see if the workshop was organised again?

ACTIVITY

31

Critiquing Evaluation Tools

Aims

- To practice the skills involved in designing an evaluation form
- To critically analyse an evaluation form

Task

Stage One

The facilitator will ask you to work in pairs and critically examine one of the two example evaluation forms by answering the following questions:

- 1 What do you think are the main strengths and weaknesses of the form?
2. How do you think the information provided can best be analysed and the result of this analysis used effectively?
3. Suggest some ways in which the evaluation form might be improved.

Stage Two

You will be asked to form a group of four with a pair of participants who looked at a different evaluation form. Report to each other on what you have found. Finally draw one or two conclusions about designing evaluation forms based on your different experiences.

Evaluation and reflection

You will remember in Part Six of the manual we talked about the importance of giving participants the opportunity to reflect from time to time on what they have learnt. Reflection is closely linked to evaluation.

If, during a five day course, 20 minutes is given each morning to reflect on what has been learnt so far, then this is evaluating the teaching and learning experience as you go along. It will reinforce the learning that is taking place and will help you adjust the programme if necessary. Experience indicates that regular reflection activities strengthen any end of course or workshop exercise you carry out. On page 85 of Part Six we suggested several different kinds of reflection activity. You may want to refer back to these if you are designing a workshop or course.

Limitations of workshop evaluation tools

Even if you design a course, workshop or study circle with clear aims, reflection opportunities and a reasonably designed evaluation form or 'happy sheet' as they are sometimes called, this will only give you so much information. End of course evaluation forms have many limitations:

- Unionists who have participated together with their union colleagues and shared the experience of a course may enjoy the experience regardless of the learning that has taken place.
- Evaluation forms are usually handed out at the end of the workshop and participants may just consider them another admin form and not give the questions due care and attention
- Participants may be reluctant to criticise a facilitator and the material they have used if the facilitator is present. This lack of objectivity may be reduced if you point out the forms are anonymous, but participants may still be reluctant to criticise objectively if the facilitator hands out and collects the forms.
- Evaluation forms are often handed out and the responses not effectively analysed, apart from immediate feedback to the educator.
- An end of course evaluation form will not tell you anything about change in the workplace or community. You can ask participants if they think what they have learnt will help them bring about change but you can't provide any evidence that this is actually happening.

One way round this last limitation is to refer to the experience of previous courses. Here is an example of a review exercise which takes place at the beginning of a stage 2 course for union reps in the AMWU

MODEL ACTIVITY:

Education and Change

Aims

- To reflect on what you have learnt on previous delegate courses
- To explore the link between union education and change

Task

Working together in your group, reflect on what you have each learnt on the stage one course. Prepare a brief report for the workshop which includes:

- A list of the most important things group members have learnt
- Examples of things you have learnt that helped you strengthen the union at your workplace. List a number of concrete examples

Involving other stakeholders

So far we have been looking at evaluation that takes place during or at the end of a course, study circle or workshop. The main people involved have been course participants. If you want to attempt to measure the effectiveness of your education and in particular the ability to bring about change you may have to involve other people in the process. Here are some common scenarios.

Women activists and reps. A union with a substantial and increasing women's membership notices that there are few women's activists and reps coming forward. After doing some research it decides to run some courses aimed specifically at women activists in order to encourage more women to take up activist and leadership positions in the union. The courses are popular and the evaluations from these workshops are all favourable

Membership involvement. Union reps continually express difficulty in getting members to take an active interest in the union. As a result the union has introduced a membership study circle system where members can come along and learn more about the union and how they might be involved. The courses have proved popular.

Reluctant union reps. A union has identified a problem with union reps who are reluctant to solve problems for themselves. They have a tendency to call in the union official to solve any of their problems and to negotiate for them. The union rep education programme is overhauled and the emphasis is placed on delegates solving their own problems together with their members and giving them the skills to do this.

Health and safety issues. A few years ago national legislation was introduced which gave workers the right to elect their own safety reps at the workplace. In many workplaces where the union is well organised safety reps committees have been formed. There has been a tendency for these committees to operate without fully consulting the union reps. The union has decided to develop joint workshops at a number of key sites where this is a problem. The aim of the workshops is to bring the safety reps and union reps closer together.

Union organisers. The union is concerned about falling union membership. Some of the union organisers are set in their ways and resistant to trying new ways of organising. An organiser development programme is introduced to help develop new skills and new ways of organising. There is some initial resistance to this training from the organisers, who eventually participate.



ACTIVITY

32

Who to Involve in Your Evaluation Programme

Aims

- To think about who to involve in your evaluation process
- To think about what you might ask different stakeholders.

Task One

Your facilitator will give you one or two of the six scenarios that are described above. Take the scenario and discuss who you would involve in the evaluation of the education programme. Make a list of the main groups you would want to involve and say why you have selected them.

Task Two

Select one or two of the groups you wish to involve in the evaluation of the training and identify what information you would be seeking from them and how you might collect it. Also identify any other sources you would check on to validate their responses.

Notes

Evaluating programmes

When you are evaluating a whole education programme then you will probably need a wide number of evaluation tools. These may include such things as:

- An analysis of workshop evaluation forms
- Structured interviews with key players and stakeholders. Delegates could be interviewed and asked for evidence of members becoming more involved for example
- Collecting evidence of changes in the workplace and community. Union reps could be interviewed three months after training to see what changes they have made at work.
- Analysing data concerning key evaluation criteria. If, for example, we consider the first scenario of involving women, an analysis might be carried out of the number of women standing for office as a union rep, once the women's activist courses had been conducted.

The Kirkpatrick model

Perhaps the most widely known model for evaluation in adult education and training is the four level model suggested by Kirkpatrick. He suggests the following four levels when evaluating an educational programme.

Level 1 Reaction: Were people satisfied with the course programme?

Level 2 Learning: Did participants learn any thing?

Level 3 Behaviour: Have participants applied what they have learnt or changed their behaviour?

Level 4 Results; Was the programme / course worth it?

As the Kirkpatrick model has mainly been designed for companies, Level 4 is usually interpreted as being concerned with profitability. When looking at union programmes it could equally be concerned with such issues as value for money and increasing the effectiveness of the union. If you wish to use the Kirkpatrick model, or four categories, then it is suggested that the model works upwards from level one to level four. You can find many full descriptions of the model on the net. A web search conducted using Donald Kirkpatrick will give you many articles and resources to choose from. If you use the link below then you will find a slide presentation that explains the Kirkpatrick system in some detail:

■ <http://www.science.ulst.ac.uk/caa/presentation/kirkpatrick/index.htm>

It may also be useful just to ask the four basic questions in the model and then frame your own evaluation tools to answer each one.

Using the results

The results of any evaluation can be used to improve many aspects of adult education and training. This may include:

- the current programme for current learners
- the current programme for future learner
- future programmes for future learners
- the team involved in teaching facilitating or training any particular course or programme
- the union or union department, division or region involved in the education.

Analysing the results of any evaluation tools and ensuring these results are known and acted upon is an important part of any evaluation regime. If evaluation becomes a routine or chore then it will have little meaning for any of the stakeholders that are involved.

Evaluation checklist

Here is a useful checklist of questions, if you are designing your own evaluation process.

CHECKLIST

- Does your workshop or programme have a clear set of aims that can be evaluated?
- Are you using both formative and summative evaluation tools?
- Are the evaluation tools you are using collecting both qualitative and quantitative responses?
- Have you tested out any evaluation tools you are using before they are implemented?
- Have you used open rather than closed questions?
- Do your courses, workshops and study circles give periodic opportunities for reflection and evaluation as they progress?
- Are all the interested stakeholders involved in designing and sharing the results of any evaluation that is carried out?
- Have you planned how data is to be collected and analysed?
- Have you thought about how to distribute the results in a way that they are likely to be acted upon?
- Is there a system in place to review your evaluation methods from time to time with a view to improving them?



SUMMARY

In this part of the manual we have looked at why you need to evaluate your education programmes and workshops. We have suggested that:

- Evaluation is a continuous process which you should consider when designing your education programmes. Reflection is an important part of this process.
- The evaluation tools you use should give you objective data to assess the value of your courses to your participants, to the union education team and to the union.
- Both quantitative and qualitative information is useful to evaluate a course, workshop or study circle.
- If you are evaluating a programme then the four levels of evaluation suggested by Kirkpatrick may assist you design your evaluation tools.
- Information collected during evaluation exercises needs to be analysed and acted upon if it is to be of any use.

In the final part of the manual we will look at some of the wider issues that union education can address in seeking to improve the quality of life of union members and their families in a global economy.

SELF LEARNING ACTIVITY

Read through this part of the manual and then carry out activity thirty three as an individual exercise. If you can, work together with one or two other educators or study circle leaders.





Union Education, Change and the Global Economy

Introduction

In the first part of the manual we looked at three case studies of the use of adult education to develop civil society and tackle social issues and human/union rights. The three examples were:

- Scandinavian study circles, which made a major contribution to the development of social democracy and civil society in Sweden and other Scandinavian countries
- The work of Highlander with unions and with the civil rights movement in the United States
- The approach to adult literacy developed by Paulo Freire, which focused on the poor and encouraged them to question the reasons for their poverty in order to change their world.

These case studies indicate that adult education is concerned with basic questions such as how society is organised and how wealth is distributed. In the past, national union programmes have focused on their own economies in order to bring about political and economic change. As Governments have increasingly surrendered their economic sovereignty to regional trading blocs and to the global marketplace, unions are faced with new struggles.

In this final part of the manual we will look at some of the current developments in union education that seek to deal with this new reality. We will look at:

- A case study of the Australian union movement's response to declining union membership, building on the experience of other developed countries.
- A case study from Brazil of a programme developed with the unemployed
- Examples of education materials from Canada and the UK which deal with globalisation
- How the IMF is facing up to the challenge of globalisation and an education initiative to educate unionists about globalisation.

FIGHTING DECLINING MEMBERSHIP: THE AUSTRALIAN EXPERIENCE

In this first case study we will look at the Australian experience. As with most developed economies union membership has fallen over the last two decades. This decline has been particularly severe in Australia. Between 1990 and 1998 for example the proportion of the workforce belonging to trade unions fell from 40% to 28%.

Unions at Work: The Australian Experience of Fighting Decline

During the 1990s unions in many developed economies suffered a loss of membership. This was partly due to the decline in traditional well organised manufacturing industries, but also the inability to organise effectively in the new economy. Other factors that contributed to this decline included privatisation, globalisation, an increase in anti union activity by multinational companies and Governments and the increasing use of casual and part time labour as an alternative to providing full time work.

In 1999 the Australian Council of Trade Unions (ACTU) set out to examine what unions in Canada, Ireland, the UK and the US were doing about the problem of falling membership. As a result of this initiative, a report was produced entitled “Unions at Work.” This report focused on what unions in Australia had to do to arrest the decline in membership. A key finding of the report was the need to expand the role of the delegate or union rep in Australian unions. Historically, bargaining in Australia had taken place at officer level and Australian unions and their union reps were ill prepared for the growth of enterprise bargaining. One of messages from the overseas study visit was that where there were strong union rep structures union density increased. The American experience also indicated that union reps were often most successful at organising new workplaces. The Unions At work report was accepted by Congress as were a number of its wide ranging proposals. The report promoted an organising model rather than a servicing model for unions. Among other things this required union officials and organisers to develop union delegates and activists so that they could solve their own problems at work and also help to organise more members into the union.

It was clear that union education had a key role to play in bringing about this change. The ACTU combined the work of its Organising Works Unit that focused on new organising initiatives with TUTA which was its trade union education unit. These combined to form the Organising Centre. The educational programme provided for affiliates by the new Centre was best summed up by the slogan “Organising in everything we do.” All courses were concerned with promoting organising. This is evident in the first two curricula produced by the Centre:

- Developing workplace activists
- Winning in the workplace.

Some unions in Australia had their own programmes which also followed the same path. The AMWU, for example, overhauled its delegate education programmes in 2000 to focus on an organising and campaigning approach which developed delegates and activists. It has just recently embarked on a comprehensive programme for full time officials and organisers to promote a new campaigning and organising culture in the union.

In recent years the decline in union membership in Australia has been arrested. It remains to

be seen whether unions can now grow their membership again. In the battle to achieve this, union education has a crucial role to play in bringing about change from within unions. A key lesson of the Australian experience is the need for education and organising to be closely linked and to use union education programmes as agents of change.

ACTIVITY

34

Organising in Everything We Do

Aims

- To examine your education courses for organising opportunities

Task

Working together in your group, select a particular course, workshop or study circle that you deliver. Look at the aims and timetable and identify where you have built in organising activities. If there are no organising parts of the syllabus then come up with some ideas as to how and where you might introduce topics and activities that would encourage union organising, campaigning and activism

Prepare a brief report to give to another group on your findings.

If you don't have existing course material with you then select one of these suggested courses to work on:

- A five day course for new union delegates
- A three day course for union appointed safety reps
- A ten session study circle for union members on becoming active in the union
- A five day course for women activists
- A five day course to train union delegates and activists as union educators.

Notes

EMPOWERING THE UNEMPLOYED IN BRAZIL

The second case study involves working with the unemployed in Brazil. Here an education programme has been designed and implemented by the Brazilian Metalworkers Confederation in response to the problems of industrial restructuring and unemployment in the metals industries.

Working with the Unemployed: CNM/CUT, Brazil

This case study looks at innovative programme designed and delivered by the Brazilian National Confederation of Metalworkers. This national confederation is made up of 96 unions which represent 1 million metalworkers. Unemployment in Brazil's main industrial centres is high and metalworkers face the challenge of their work being restructured and old skills being made redundant. The Integrar (Job Instruction and Qualification) programme has been designed to meet these challenges. It has also been designed as an alternative to the official approach to vocational training for the unemployed.

The Integrar programme offers unemployed workers a training programme of fourteen units which in total amount to 700 hours of teaching and learning. During this time both technical education and primary certificate education takes place. The need for covering the primary certificate stems from the fact that many workers and unemployed workers from the metals industry have had very limited school education, thus limiting their ability to re enter the job market. The Integrar programme has been successful and currently there are 53 Integra Centres organising 106 courses. The centres are set up in union premises, churches, schools and other civil institutions. Although primarily aimed at the unemployed, metal workers in employment can also participate. Research carried out by CNM/ CUT in Sao Paulo indicated that 88.5% of participants in the programmes were unemployed and 11.5% were in employment.

The Integrar programme differs from official programmes in a number of important ways. The programme promotes the idea of active citizenship. Participants are encouraged to pressurise institutions to debate the problem of unemployment and focus on job creation initiatives. They are encouraged during the programme to debate alternatives to unemployment, produce proposals, address local authorities, state authorities and universities to encourage change and implement new schemes. They are encouraged to fight for re-entry into the job market, both socially and professionally and to fight for their rights. As one unemployed metal worker participant put it:

People say there is one thing they can't take away from you and that is your dreams. As time goes by, though, even that is stolen from you. In the Integrar programme I took my dreams back and I'm trying to have them come true.

The education programme starts by recognising the value of the metalworkers own experience in industry and builds from this experience. This helps to restore the workers personal dignity and self esteem. Another participant stressed the importance of this aspect of the programme:

"The most important of all was the fact that I realised that my factory time was not wasted time. I learnt a lot of practical things that I now put to work in class.

The courses are taught by a teacher and instructor. The teacher focuses on formal knowledge and the instructor on workplace knowledge. The instructor will usually be an unemployed

metalworker. Each unit will be made up of technical knowledge and common areas of general knowledge. This mixed approach has proved both effective and popular.

The Education Secretary of CNM /CUT believes that getting involved in this kind of education went through three stages:

Perplexity The union and union officials were perplexed about the scale of the problem and why the union was getting involved.

Resistance This was followed by a period of resistance where people did not want to change their ideas or duties.

Commitment As the Integrar programme gained momentum this resistance was replaced with a commitment and understanding of the programme and what it was trying to achieve.

One of the things that the Confederation has learnt is the need for unemployed workers to understand their political and economic environment and to campaign for change.

ACTIVITY 35

Working with the Unemployed

Aims

- To identify ways in which your union can work with the unemployed

Task

Working together in your group, come up with some ideas for working with unemployed workers. Try and make sure your suggestions are practical and achievable. You will be asked to present your ideas to another group of participants.

Notes

UNION EDUCATION AND GLOBALISATION

Underlying both of these case studies is the process referred to as globalisation. Union education increasingly needs to deal with issues of globalisation, free trade and the global marketplace to explain the circumstances of working people's lives and to develop alternatives. This needs to be done at all levels of union education. To explore this further we can look at some examples of IMF affiliated unions who have attempted to do this in different ways.

The Canadian Auto Workers

Here, for example, is an extract from some material produced by the Canadian Auto Workers on the WTO and corporate driven free trade. The material is primarily aimed at activists and members. The material goes on to consider what unions and other groups can do to fight this corporate agenda.

What's all the fuss about?

Globalisation and the WTO: what you need to know

Why are all these different people together?
 Why are they so angry?
 Why are they so worried?

PEOPLE BEFORE CORPORATE PROFITS
 STOP THE WTO
 NO WTO

THEY ALL HAVE A COMMON CONCERN, AND HERE IT IS IN A NUTSHELL

Fact: Right now, powerful, unelected officials in international trade organizations are forcing Canada, along with many other countries, to get rid of some of our most important economic AND social policies!

Fact: The most powerful of these institutions is the World Trade Organization (WTO). It's making decisions that could eventually affect everything from our health, to our jobs, to how your kids are educated—even to where you get your drinking water from!

Fact: So far, our government is going along with the whole charade—after all, they helped set it up. And despite the damage already being done, Canada's government is working with other governments to actually EXPAND the power of this unelected global trade body!

HOW DID THESE GUYS GET SO MUCH POWER?
 HOW WILL THEIR ACTIONS AFFECT US?
 MOST OF ALL, HOW CAN WE STOP THEM?
 COME WITH ME, PEOPLE, LET'S FIND OUT...

Introducing GLOBOMON, proud defender of the planet against growing corporate greed!



Basically, it started with the Canada-U.S. Free Trade Agreement...

The Canada-U.S. Free Trade Agreement was signed in 1989. It was the first trade agreement to go way beyond talking just about trade. It gave all kinds of special protections to private corporations. And it created strange trade "courts" to settle disputes which were supposed to be only about trade.



The WTO: What's next if we don't stop them?

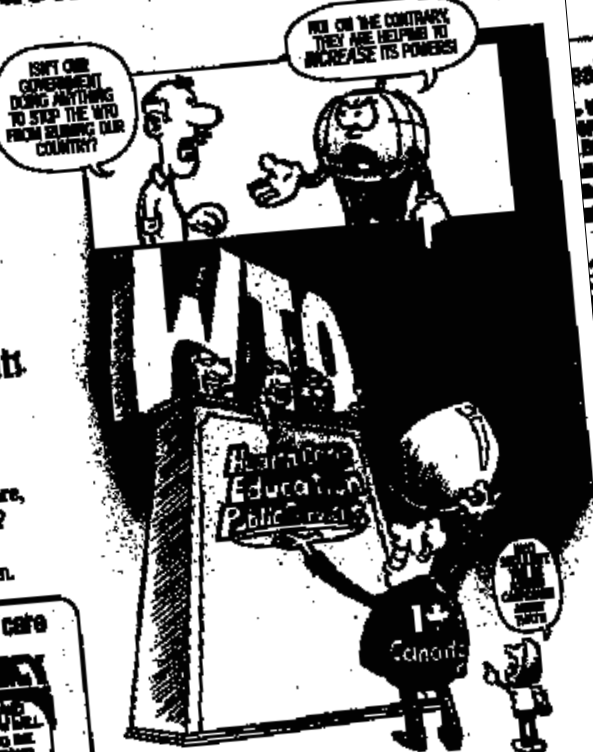
When they created the WTO in 1995, the world's leading governments created a monster. That monster is now on a worldwide rampage, forcing countries to change their social and economic laws in favour of huge corporations. But shocking as things may seem, they are about to get much worse!

Believe it or not, Canada is working with other governments to EXPAND the WTO's powers!

Talks are underway to give the WTO the power to overrule government policies in areas like health care, education, and other public services. The result? We may soon have no choice but to privatize these services, and open them up to corporate domination.

Get ready for American-style health care

Once "health in services" is negotiated at the WTO, our health care system could be in a death row. If one province allows private hospitals, the WTO could demand the same thing in all other provinces. Why? Because privatizing health care would then be an unfair restriction on corporations. One simple WTO ruling could send us quickly toward U.S.-style health care.



Worst of all, negotiators want to give the WTO's kangaroo courts the power to overrule any national law or regulation—such as a health and safety rule in your workplace, or regulations concerning drinking water—with a so-called "necessity test." Basically, if the WTO court doesn't think the rule is "necessary," then it's dead—even if the rule has nothing whatsoever to do with foreign trade or foreign investment!

joined the Free TA, com- s if they d their

Health - keep the of countries. that - you. well. we're the '90s. the powers!!



WTO

Amicus (The UK)

Amicus is a British union representing workers in a wide range of manufacturing and service industries. The union has its own labour college and also conducts courses on line for union members, in conjunction with the School of Continuing Education in Leeds. Together with Labour and Society International and Leeds University, the union developed a certificate in global labour studies for union officials and activists. The course was described as:

“A unique course exploring the vast and controversial issues of globalisation”

These issues are explored through five modules which are;

- Understanding globalisation
- Globalisation and work
- Poverty and inequality in a global world
- Solutions and solidarity within a global world
- Researching globalisation.

The certificate was delivered in what is called a mixed mode. In addition to day schools and residential sessions at the Amicus labour college, material was made available on line for those that found it convenient to learn in this way.

According to Brian Kelly of Amicus, who helped manage the project:

“Amicus is an international trade union. We organise workers in sectors of the economy that are inescapably tied into the global market place, in manufacturing, financial services and the voluntary sector. The certificate in Global Labour Studies will help equip our representatives and members with the knowledge and skills to prosper in a globalised economy and at the same time promote international cooperation and solidarity.”

Although the certificate is part of the formal education system, participants are encouraged to be active on global issues within the union and in their own lives. The course also seeks to make global issues relevant. Here are two reflections from participants in the course.

“Since I came on the course I’ve started talking to the kids about looking at labels when they’re buying their trainers and I get them to talk about fair trade issues.”

“The industry I work within is now globalised. We are all being affected one way or another so the course has a real relevance”

*Don Mullins, Irish National Executive member,
maintenance manager, motor manufacturing industry*

The Transport and General Workers Union (UK)

The TGWU is one of Britain's biggest general unions representing workers in transport and manufacturing industries. The TGWU developed an international development project together with the Workers Education Association in the UK for the four main divisions of the union. The project is described fully on the TGWU web page devoted to the project.

■ <http://www.tgwu.org.uk/TGWUInternatEd/index.htm>

☐ About the Project
☐ Contacts
☐ Resources
☐ Web Guide
☐ Project Partners
☐ Search this site
☐ Education Materials

This website provides an opportunity for T&G members (and others in the trade union movement) to learn more about globalisation, international trade unionism, and questions of international development. It is also intended to assist T&G lay tutors to develop course components that address questions of globalisation and international development.

☐ Guided Tour of the site

The project is organised by the T&G in partnership with the Workers' Education Association, England and Scotland,



and is financially supported by

Education materials available on this site:

☐ Food and Agriculture

What is the future of global agribusiness? What does it mean for workers in the sector?

☐ Textiles and Garments

How can workers in the sector respond to new divisions of labour, the restructuring of textiles production chains, and supply chain management?

☐ Oil and Chemicals

What action should trade unions take in response to the radical changes that are taking place in the world's oil and chemicals industries?

☐ Transport

As the globalisation of the world economy has only been made possible by dramatic changes in the technology and organisation of international transport - how should workers respond?

☐ Tutor Training

How can lay tutors integrate questions of globalisation and industrial development within the T&G's education programme?

Go directly to our ☐ Education Materials ☐ Tutor's Guide

This project aims to increase T&G members' awareness and understanding of processes in international development, and to develop new partnerships between the T&G and trade union educators in developing countries.

The objective is to ensure that issues and perspectives in

One of the central ideas of this project is to promote a greater understanding of the work of the Global Union Federations that the TGWU is affiliated to.

This website provides an opportunity for T&G members (and others in the trade union movement) to learn more about globalisation, international trade unionism, and questions of international development. It is also intended to assist T&G lay tutors to develop course components that address questions of globalisation and international development.

Education materials available on this site:

Food and Agriculture. What is the future of global agribusiness? What does it mean for workers in the sector?

Textiles and Garments. How can workers in the sector respond to new divisions of labour, the restructuring of textiles production chains, and supply chain management.

Oil and Chemicals. What action should trade unions take in response to the radical changes

that are taking place in the world's oil and chemicals industries?

Transport. As the globalisation of the world economy has only been made possible by dramatic changes in the technology and organisation of international transport - how should workers respond?

Tutor Training. How can lay tutors integrate questions of globalisation and industrial development within the T&G's education programme?

This project aims to increase T&G members' awareness and understanding of processes in international development, and to develop new partnerships between the T&G and trade union educators in developing countries.

The objective is to ensure that issues and perspectives in international development are introduced as a permanent and integral element in the T&G's education tutor training programme; an introduction of new skills for union members to engage in international activities - that can then contribute towards positive developmental change in the global workplace and workforce.

The project brought together TGWU union officials and activists, unionists from developing countries and staff from the Global Union Federations to explore international development issues and solidarity.

ACTIVITY

36

Dealing with Global Issues

Aims

- To think about how and why you need to deal with global issues

Task

Working together in pairs, discuss the following questions.

1. Why do you think it is necessary to deal with global issues in union education programmes?
2. What should our approach to globalisation be?
3. How might union educators in developing economies deal with globalisation differently than union educators in developed economies?

ACTIVITY

37

Education and Globalisation

Aims

- To identify opportunities for dealing with globalisation
- To draw up a plan for developing a course, workshop or study circle on global issues.

Task

Working together in your group, select one of the two tasks below to work on.

- a) Examine the union education programmes you are involved in and identify areas of the programme where you might introduce global issues.
- b) Outline a course, study circle or workshop on global issues that you would deliver to a specific target group in the union. Describe the main topics you would deal with and how you would seek to make these topics relevant for the participants.

The IMF and globalisation

If you are developing your own material on globalisation you may wish to look at IMF policy on globalisation. This is contained in the IMF action plan, agreed at its last world congress in Sydney. Here is an outline of the strategy.

- Building a global metalworkers' movement
- organising the unorganised
- giving international solidarity more impetus
- Dealing with transnational corporations
- negotiating international framework agreements
- creating new information strategies
- Implementing countervailing union power
- developing an alternative economic programme
- securing workers' rights
- ensuring that economic development is sustainable.

The full action plan is available from IMF offices and on the IMF web page. One other resource that may be helpful is the cartoon book produced by the IMF called *Solidarity, Building a Global Metalworkers Movement*. This explains globalisation and the IMF action plan by telling a story in cartoon form. It is aimed at educating members and activists and is available in nine languages.

SUMMARY

In this final part of the manual we have described some of the wider issues that can be tackled by the union educator.

- We started by reflecting on some of the earlier cases studies of bringing about change through education. We then went on to consider the Australian case study of reversing decline in union membership, a problem being experienced in most developed countries.
- We then considered an innovative case study from Brazil working with the unemployed. An important part of this case study was the unique approach the CNM/CUT developed in dealing with this kind of vocational training to empower workers in the programme.
- This was followed by three examples of IMF affiliates developing educational material on globalisation. The CAW example demonstrates how complex issues like the WTO can be explained simply and in a way that stimulates anger and action. The British union Amicus has developed a certified formal course to deal with the issues of globalisation. The TGWU from the same country carried out a workshop based programme for its four main industrial sectors highlighting the role of Global Union Federations
- Finally we briefly looked at the IMF policy or action plan on globalisation which we suggest you integrate into your education programmes.

Unions in the past, and now, have needed to deal with political and economic issues in their education programme. They have also needed to develop campaigning and activism to bring about change. One thing you and the other educators in union can do is to tackle a global perspective in your education programmes and encourage solidarity and change. In the appendix you will find some useful references and web sites that may help you do this.

Using the manual

There are many ways in which you may wish to use this manual. In the beginning we suggested you might use it -

- as a guide or companion for educators involved in any aspect of trade union education. You can use it on its own or together with your own material.
- as a basic resource tool for you to use when you are planning and organising educational course, workshops or study circles
- as a course book for training educators and study circle leaders

To help you with this last task of training educators the IMF will produce a tutor guide as a companion to the manual. This tutor guide will be available on line and in hard copy. It will contain advice on how to facilitate some of the more complex activities, draft timetables for different target groups and general guidance.

The book has been produced with the help of educators from a number of different IMF affiliates who have provided case studies and other materials. The IMF hopes to continue this sharing of ideas about good practice between affiliates to help strengthen your education programmes. The IMF would welcome ideas about the manual and its usefulness.

As we have seen, union education can help strengthen unions and campaign for a better world for working people. To go back to an old but relevant slogan we hope you continue to

Educate, Agitate and Organise

Appendix

Useful Internet Addresses

In the text of the manual we have referred to a number of web sites which suggest you might like to have a look at. In addition to these specific references there are a number of other sites that you may find useful. These are listed below and we suggest you have a look at them and bookmark them or make a note of them.

The International Metalworkers

Federation (IMF) has a web page which will give you information on the International, its policies and activities. The web page also has union news stories about campaigns and struggles affecting IMF affiliates. The IMF is now also providing access to education publications like this one through its web pages.

www.imfmetal.org

The International Labour Organisation

(ILO) has a very large web site which includes information on education, health and safety and issues like child labour and HIV Aids. It is a major information source for unionists. It also has a number of educational resources available on line.

www.ilo.org

The International Confederation of Free Trade Unions, (ICFTU)

has a web page which will give you information on ICFTU activities and union rights campaigns. On the ICFTU web page you will find a link to global unions. Here you will find details of current campaigns being run by all of the global union federations.

www.icftu.org

Labourstart is an on line news service for trade union officials and activists. Here you will find up to date news on union struggles around the world. You will also be able to join campaigns and receive regular information on unions and the internet.

www.labourstart.org

The International Federation of Workers' Education Associations, (IFWEA)

has a web site which gives details of its activities and conferences. You will also find details of IFWEA international study circles and a links facility which will help you navigate to most of the sites listed here.

www.ifwea.org

The European Trade Union College

(ETUCO) has a web site devoted to union education and here you will find details of courses and education materials used throughout Europe. There are also web based resources and discussion forums.

www.etuc.org/etuco/en/default.cfm

National Centres. Most union national centres have useful web pages. You will often find education resources on them. We suggest you look at some of the web pages of the bigger national centres in your region. The TUC in the UK is an example of a national centre that has a large number of union educational resources on line.

www.tuc.org.uk



International Metalworkers' Federation
54 bis, route des Acacias, Case Postale 1516
CH-1227 Geneva, Switzerland
info@imfmetal.org, www.imfmetal.org