

Building Union Capacity to Coordinate Worker Education and Training Projects

Lifelong Learning Action Research Project Report



**Labour Education Centre and
the Centre for the Study of
Education and Work (OISE/UT)**

**Centre for the Study
CSEW
of Education and Work**

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Overview

This report is the result of a collaborative research project of the Labour Education Centre (LEC, formerly Metro Labour Education Centre) and the Centre for the Study of Education and Work (CSEW) at the Ontario Institute for Studies in Education/University of Toronto. This research is part of a broader project which is funded by Human Resources Development Canada and is intended to better equip unions to develop and manage worker education and training project.* The report will be useful to current and future project coordinators as well as others interested in worker education and training and labour education.

The project report provides a snap shot of union management of worker education and training projects, and of the supports needed for coordinators of such union work to strengthen their effectiveness.

The research project contacted 150 people from 90 worker education and training projects in English-speaking Canada. Though not representative of the union movement as a whole, the study draws on a substantial sub-set of unionists active in this field.

Based on interviews and discussions with over 80 coordinators and practitioners and on a survey of relevant literature, this study finds extensive union activity across English-speaking Canada, notably in work-related skills development and basic skills programs. Informal networks among coordinators and practitioners are strong, but the lack of overall structure parallels the patch work of initiatives by governments and employers.

* Worker education and training includes basic skills (such as literacy, English upgrading, English as a second language, basic computers), adjustment services for workers facing layoff or plant closure, career transition services for members looking to change jobs, skills training (including apprenticeships, though this area was not a main focus of this research project), and public education partnerships including secondary credit courses. The research project distinguished worker education and training from union or labour education. Union education focuses on educating union members to perform union roles and to support the union's goals and objectives, and includes hands-on "tool" courses such as stewards' training, grievance handling and collective bargaining, as well as more theoretical "issue" courses such as labour history, anti-racism and political action.

Training coordinators are proud of their work, and aware of the complex political and process skills required to do it well. They express a need for more mutual support and for development of practical organizational and administrative skills.

The study identifies areas of strength in current worker education and training practice, draws a comprehensive portrait of the skills and knowledge required for its coordination, and points to possible initiatives, by the Labour Education Centre and others, that could enhance the capacity of unions to address more effectively member needs in this area.

Thank You

We appreciate the work and commitment of the research participants. These busy colleagues, juggling a multitude of tasks, took the time to complete a questionnaire, be interviewed by us over the phone, in some cases meet with us in person or participate in a focus group, and give us feedback on the preliminary findings. Thank you!

Research Partners

The researchers are Anna Larsen of LEC and Sheila Stewart of the CSEW, supported by Janet Dassinger of LEC and David Livingstone and D'Arcy Martin of CSEW.

The Centre for the Study of Education and Work brings together academics, labour educators and community partners to understand and enrich the often undervalued informal and formal learning of working people. The CSEW develops research and teaching programs on learning and work. It promotes policy initiatives and public events connected to both paid and unpaid workplaces, in traditional and new media for learning .

Over the past five years, the CSEW research network on New Approaches to Lifelong Learning (NALL) has conducted many studies of learning practices in different workplaces (see website www.nall.ca). NALL's basic objectives were to:

- document the relations between informal learning, formal and non- formal education
- identify major social barriers to integrating informal learning with formal and non-formal programs and certification
- support new program initiatives that promise to overcome these social barriers

Originally created in 1976 by the Toronto and York Region Labour Council as the Centre for Labour Studies, the Labour Education Centre is uniquely positioned to conduct research into the area of worker training. Unions, government and the broader education community recognize LEC for its original and innovative worker education and training programs, most notably:

- The first *Labour Studies* certificate program in Canada providing a wide range of labour education courses for union activists.
- *Workplace Programs*: planning, coordinating and delivering workplace- based skill development courses, including ESL, literacy and computer training.
- *Worker Adjustment*: responding rapidly to unionized laid-off workers through innovative programming such as career counselling, clear language about unemployment insurance, labour market information, training and education programs, and advocacy. LEC also encourages unions to improve their effectiveness in such areas as participating in joint adjustment committees, coordinating basic skills and vocational training for unemployed members, establishing peer counselling programs at workplace or union hall "Action Centres" and so on.
- *Equality*: integrating equality principles and practices into training and education programs by providing multilingual health and safety and other union materials; creating and delivering anti-racism and cross cultural training to unions and community groups; and conducting action research of the needs of equality seeking groups in the fields of education and employment.
- *Materials*: developing extensive worker-centred, clear language learning materials such as customized ESL curricula and learning approaches for specific sectors and occupational groups; worker adjustment materials; and publications relating to labour history and such issues as anti-racism.
- Conducting and analyzing the results of both individual and organizational training needs *assessments*.
- *Creating networks* of unions and other groups to promote and deliver worker training.
- Encouraging unions and central bodies to develop worker education and training *policy*.
- *Recruiting and developing union activists as staff*. LEC values highly the skills and knowledge of activists, and has recruited and trained them through work experience and mentoring.

Growing expertise, combined with comparatively accessible public funding, resulted in continued organizational growth during LEC's early years. By 1996, LEC employed over 45 full-time and 80 part-time counsellors, instructors, and project coordinators.

Though its founders originally conceived the Labour Education Centre as a service-delivery organization, over the years LEC also gained an important role advising unions, community and joint labour-management groups initiating worker education and training projects, including information, advice and in some cases direct assistance to such programs as:

- ❑ The Ontario Federation of Labour Basic Education and Skills Training Program (BEST) which offered workplace literacy and ESL programs to workers across Ontario from 1989 to 1998
- ❑ The Saskatchewan Federation of Labour Worker Education for Skills Training Program (WEST) which has offered ESL and literacy to workers across the province since 1988
- ❑ The Hamilton and District Labour Council Worker Education Centre, which offered ESL, literacy and labour adjustment services to Hamilton area workers between 1987 and 1998
- ❑ The Brampton, Mississauga and District Labour Council Labour Action Centre offering adjustment services for unemployed workers since 1995
- ❑ The Winnipeg and District Labour Council and the Manitoba Federation of Labour which offered labour studies and a Labour Communication Skills Project between 1993 and 1996
- ❑ The Canadian Autoworkers Union. LEC trained peer counsellors from across Canada to deal with workplace layoffs and closures.
- ❑ The United Food and Commercial Workers Union, which created a national Layoff and Closure Program in 1990 to assist laid-off members. LEC was widely consulted and produced a manual called "Paying the Price: A Workplace Guide to Layoffs and Closures."

Unfortunately, 1996 saw the beginning of major government funding cutbacks that reduced and, in some cases, completely eliminated many successful programs. Still, by 2000 LEC was convinced that the cumulative effect of these programs had been positive in encouraging a growing awareness by unions of the significance of worker education and training, especially to realizing broader political and educational goals. Where worker education and training had once been marginal to a union's policy and program activities, it now commanded greater attention and garnered more resources from leaders, staff and activists. Unions were committed to defending current worker education and training programs and creating new ones.

In September 2000, LEC convened a meeting of unions, educators and government officials to discuss a potential new project broadly titled "Lifelong Learning" that would combine action research and organizational development with unions in the area of worker education and training. By April 2001, a combination of union and government support enabled the implementation of the Lifelong Learning project.

Background to Research Project

An important premise to this project is that organized labour in Canada has unparalleled potential to stimulate interest and activity in workplace training. Unions in Canada represent over two million workers in all labour market sectors and occupational groups. Unions, despite legislative and other setbacks, remain the major institutional force in employer-employee relations today.

A growing part of these relations is centered on worker training. Joint labour-management training strategies have become a particularly important feature in North American industrial relations. In the United States, major industries such as automobile assembly, aerospace, telecommunications and steel making, have created successful joint training programs. These programs are primarily financed through collective bargaining.

In Canada, most major unions are involved in one or more sectorial human resource activities at the provincial or national level. Joint training has tended to rely more heavily on public funding. In the past, Canadian union training projects were more commonly found in the construction and skilled trades area, and devised to recruit and train apprentices. However, in the last 20 years a growing number of industrial and even public service unions have responded to member training needs, largely in response to:

- ❑ Public policy initiatives in the late 1980s and 1990s encouraging labour and management to work cooperatively on human resource issues (including funding programs that encouraged project development)
- ❑ Joint labour force development boards at the national, provincial and local levels
- ❑ Dislocation and job loss during recessionary periods (leading to many adjustment measures)
- ❑ Skill needs emerging from new technologies and work reorganization schemes

In addition to negotiating training funds with employers, unions are expanding beyond traditional union education into literacy and employment programs. A great many of these are initiated and supported through external government funding. The National Literacy Secretariat (HRDC) has funded the Canadian Labour Congress, every provincial and territorial federation of labour and many major unions to develop approaches to promoting and increasing access to workplace literacy. Local, regional and national HRDC funds have supported unions to offer basic skills and job training by unions.

As unions increased their participation in worker education and training initiatives, labour turned its attention to developing a labour vision of training that serves the needs of working people. From the late 1980s through the 1990s, various labour bodies debated policy documents and sponsored training conferences to examine the roles of trade unions, of the employers, of government and of the public education system, as well as demands that could advance labour's agenda on training. Debate and differing views emerged over some aspects of labour's perspective on training, as various affiliates dealt with different realities affecting training. This project and other labour projects build on the wealth of literature that reflects these debates and examines worker education and training in a union context.¹

Against this background of increased labour activity in the area of worker education and training, some surprising facts stand out:

First, unions remain largely unrecognized by government, employers, and educators for their potential to implement worker education and training projects, either singly or jointly with employers. There are abundant examples of unions stimulating worker education and training by working pro-actively and effectively with employers. However, aside from a handful of successful 'joint' national sector councils (such as the Canadian Steel Trade and Employment Congress) these examples are not widely known.

Second, though union staff and activists are far more likely today to be active in worker education and training, there are few sources of labour-focused information about the skills and abilities that are needed by them to coordinate projects effectively. For example, community-based agencies that deliver training and education can draw from a wide body of literature and formal training about such issues as non-profit board governance, strategic planning, training planning and evaluation.² Agency staff can be sent to courses in community colleges and universities to learn project management. In contrast, union courses are designed to teach staff and activists skills such as collective bargaining and grievance handling and do not directly address areas related to worker training, such as participation on joint training committees, forming partnerships with employers and government, or establishing vocational training delivery models with education partners. Though more and more unions have a growing role in these areas, the means for them to prepare and be effective remain largely ad hoc and informal.

While the informal network of union project coordinators and practitioners provides guidance and advice to each other, there is a need for information and formal guidance. Unionists who become involved in worker education and training project planning and implementation need to develop their own skills in order to improve their performance as union project coordinators.

The Lifelong Learning Action Research Project focused on researching the needs and how to build union capacity to coordinate worker education and training projects.

Specifically, this research asks:

1. What are the skills and knowledge needed by a union project coordinator?
2. What challenges do project coordinators face and what strategies do they use in facing them?
3. How best can project coordinators learn the skills and knowledge needed for their job?

Methodology

The LEC and CSEW developed this project as an action research project³, working with union program coordinators to research and act on identified professional development needs. As a labour-academic partnership, the project greatly benefited from the sharing of CSEW's research skills and relevant academic studies and LEC's direct involvement in coordination of labour-sponsored worker education and training projects. The relationship between informal learning, and non-formal and formal learning of both project coordinators and participants in worker education and training projects is a major theme of CSEW's and LEC's ongoing activities.

The researchers drew on relevant bibliographies⁴ to gather readings related to worker education and training as well as various aspects of project coordination. We did not attempt an extensive literature review of the debates and currents of thought related to worker education and training in a union context, since our task was limited and practical in scope.

Throughout the project, the researchers spoke to and consulted with a variety of people in the field, both academics and labour practitioners. We also investigated coordinator training from two main sources: union staff training (not specific to coordinating worker education and training projects)⁵ and post-secondary and community-based training related to adult education and non-profit management (not specific to labour).

Further research was done about informal learning, resulting in the editing and dissemination to research participants of two readings: "The Iceberg of Informal Adult Learning" by Allen Tough and "Mapping the Iceberg" by David Livingstone⁶. Participants responded positively to the two readings. As one coordinator wrote: "The temptation to only identify my knowledge by the number of certificates I hold is very great. However, the skills I have learned regarding project management, I learned through informal learning. The readings helped me to assess my learning and to give value to my informal learning."

One of the challenges in developing a comprehensive contact list for the research was the lack of a countrywide cross-union network of worker education and training projects and staff. Building on LEC's existing relations with a number of worker education and training projects in the labour movement, we developed the research participant list further by contacting:

- Canadian Labour Congress staff from the Literacy Working Group, Training and Technology Committee, Education Committee and regional directors
- education departments or directors, staff training departments and other relevant departments of most large national unions
- several provincial federations of labour, labour councils, and the Toronto-Central Ontario Building and Construction Trades Council

Research criteria focused on projects with staff coordinators, or union staff whose responsibilities include coordinating worker education and training projects. Our research interest concentrated on the management and administration roles, while recognizing that project coordinators juggle multiple roles as part of their daily work.

Worker education and training projects were defined as:

- basic skills, including literacy, English upgrading, English as a Second Language, basic computers, GED preparation (secondary school diploma equivalent)
- adjustment services for workers facing layoff or plant closure
- career transition services for members looking to change jobs
- information about and partnerships with the public education system, including secondary credit courses
- skills training

Union education was not included in the category of worker education and training at the beginning of the research project. However, early discussions with union staff made it apparent that there are no clear demarcations between worker education and union education in the work of many unions and project coordinators. The researchers therefore included union education as one of several components of worker education and training projects in the questionnaire (see Question 2, "Questionnaire", Appendix 2). Indeed, 70% of questionnaire respondents recorded that union education was a feature of their worker education and training project.

In addition, apprenticeship training was not a main focus of the research project. While recognizing that apprenticeship training is an integral part of the very existence and continued strength of many unions, particularly in the building and construction trades, the researchers decided that the distinctive features of apprenticeship are complex and deserving of separate study. We felt that our limited time and resources made it unfeasible to do justice to the topic. Therefore, the research project included only a small sample of union training projects in the area of apprenticeships: building and construction trades training centres from the Greater Toronto Area only.

Potential participants led us to other potential participants and our list grew. Participants were contacted over the spring, summer and fall of 2001 and were introduced to the project through an information letter (see Appendix 1). Concurrently LEC's Lifelong Learning Advisory Committee was being formed and the project was introduced to them at their inaugural meeting in September 2001.

In the end, the Lifelong Learning Action Research Project sample included approximately 150 people from 32 unions, 3 sectorial labour-management programs, 3 labour councils, 4 provincial federations of labour, and the Canadian Labour Congress. Research participants were drawn from approximately 90 projects in English-speaking Canada.

The questionnaire was designed collaboratively by the researchers with guidance from LEC and CSEW. Two focus groups helped us clarify questions to be included in the questionnaire:

- ❑ one with members of the Canadian Labour Congress Literacy Working Group
- ❑ one with several Labour Education Centre staff, a participant from the Canadian Steel Trade and Employment Congress, and participants from LEC Lifelong Learning project partnerships with the International Association of Machinists, and Communications, Energy and Paperworkers Union

Given the importance of equity and access issues, the research project conducted a third focus group discussion with participants from diverse projects on that topic.

A first draft of the questionnaire was piloted with several LEC staff and Lifelong Learning project partners. The revised questionnaire was then sent out by email and regular mail in early November (see Appendix 2).

The researchers contacted those individuals who did not return their questionnaire by early December and offered to do the questionnaire over the phone. Twelve questionnaires were done in this way in December 2001/January 2002. The researchers were aware of the difference in written and over-the-phone questionnaires and the greater potential for influencing the response. The phone interviews also allowed for a depth of conversation and analysis that the researchers appreciated.

In total, 77 of the 150 research participants completed a questionnaire. After compiling the data from the questionnaires and focus groups, we sent preliminary findings to both those who had found the time to respond to the questionnaire and to those who didn't. Comments and suggestions from both groups helped shape the final report.

The researchers acknowledge that the group of 150 research participants from 90 projects and 77 questionnaire respondents provide just part of a larger picture of union involvement in worker education and training. Nonetheless, our research sample provides useful insights from unionists active in the coordination of worker education and training.

Findings

Profile of Questionnaire Participants

- 48 project coordinators work full-time, 10 part-time, and 14 people coordinate projects as one of several duties
- 45 are male and 32 are female
- 26 work in public sector projects, 36 in the private sector, and 15 for projects sponsored by a labour council, provincial federation of labour or Canadian Labour Congress
- 50 work in Ontario, 10 in British Columbia, 9 in the Prairies, 6 in Atlantic Canada, 1 in the Yukon, and 1 in Quebec

Profile of Learning Projects

This research found a wide variety of worker education and training projects.[†] The projects vary in size, budget, breadth of learning programs and funding sources.

- Almost half of the questionnaire respondents coordinate projects that are solely union-based and just over half coordinate joint labour-management programs.
- Most participants coordinate projects that are funded by government and/or negotiated training fund.

[†] Worker education and training includes basic skills (such as literacy, English upgrading, English as a second language, basic computers), adjustment services for workers facing layoff or plant closure, career transition services for members looking to change jobs, skills training (including apprenticeships, though this area was not a main focus of this research project), and public education partnerships including secondary credit courses. The research project distinguished worker education and training from union or labour education. Union education focuses on educating union members to perform union roles and to support the union's goals and objectives, and includes hands-on "tool" courses such as stewards' training, grievance handling and collective bargaining, as well as more theoretical "issue" courses such as labour history, anti-racism and political action.

The range of project size and breadth is quite dramatic: from one part-time staff in a workplace basic skills project to free-standing learning centres with many staff offering numerous programs.

1. **Union education**, such as stewards' training, is featured in most of the worker education and training projects participating in the questionnaire.
2. In the **basic skills/literacy** area, several unions as well as labour councils, provincial labour federations and the Canadian Labour Congress (CLC) are conducting projects and programs. Funding from the National Literacy Secretariat HRDC continues to make a significant contribution to labour's ability to assist members in this area. The CLC Workplace Literacy Project plays a key role in supporting unions and labour literacy coordinators.
3. Many unions are engaged in **skills training** projects, mostly funded by bargained training funds. Apprenticeship training is a major training focus for many unions, particularly in the building and construction trades. Other unions active in skills training include the Graphic Communications International Union (with training centres in Vancouver and Toronto), the Canadian Auto Workers (with large bargained programs with the "Big Three" automakers), the Canadian Union of Postal Workers, and local/regional programs sponsored by the Teamsters, International Association of Machinists, and Communications, Energy and Paperworkers Union.
4. **Career transitions** was included in projects coordinated by almost half of the questionnaire participants. Career transitions is the particular focus of the joint labour-management project in the federal public service - the Joint Career Transition Committees. With 2 national and 12 regional coordinators, the JCTCs are the largest program of its type in Canada.
5. Closely related to career transitions is the area of **adjustment**, assisting workers in times of layoff and workplace closure. Both career transitions and adjustment services typically offer workshops and other programs on labour market trends, assessment, resume writing, etc. There are several union and labour council initiatives in the adjustment area, both joint and union-sponsored. The British Columbia Healthcare Labour Adjustment Agency is a significant example of a major cross-union joint labour-management project in this context. The Canadian Steel Trade and Employment Congress, with Action Centres in Toronto, Hamilton, Sault
6. Marie and Quebec as well as national services, is very active in the area of adjustment. Their activities extend beyond adjustment to include skills training, partnerships with colleges, and other learning projects.

Though a comparatively small part of the overall picture, learning and training centres offering a broad range of programs have significant experience to share with the labour movement. With 20 full-time staff, the Toronto and York Region Labour Council's Labour Education Centre offers literacy and basic skills, adjustment and employment services, labour education, partnerships with public education institutions as well as assistance to unions in the area of worker education and training. The United Food and Commercial Workers have a cross- country network of Training Centres, most of which offer basic skills classes, computer courses, GED/secondary education, union education, skills training, adjustment and career transition services. Some UFCW centres offer innovative programs for youth - be it a young worker program for members' children or an introduction to food sector jobs for youth in the community.

Rarer still are workplace-based joint union-management learning centres. The USWA/Cominco Learning Centre in Trail, British Columbia offers a mix of academic and personal interest courses. Many workers originally got involved by taking a course like Boat Pro or Stained Glass, and then later went on to take more academic courses.

Almost half of questionnaire respondents noted their project includes partnerships with or information about the public education system. Partnerships include teacher provision of secondary credit courses, and use of college or school board instructors in the delivery of upgrading, ESL and skills training programs.

21% of questionnaire respondents reported relationships with sector councils. In addition, several respondents noted a total of 17 other programs or services offered as part of their worker education and training project.

Worker Education and Training and the Labour Movement

Participants were asked their views on the importance placed by unions generally on worker education and training (WET), as well as the importance their own union gives to specific aspects of WET. The vast majority of respondents described an increased interest in and importance unions place on worker education and training. 84% agree or strongly agree that WET is a key part of their union's agenda. 75% agree or strongly agree that WET is an explicit goal of leadership. 60% agree or strongly agree that WET is a regular item in discussion of union representatives and bargaining committees. 68% agree or strongly agree that WET has an allocated budget and specialized staff.

This positive picture reflects the fact that respondents' unions and labour bodies are actively engaged in worker education and training. A larger sample drawn from the labour movement as a whole might produce different findings. Nonetheless, as outlined in the "Background to Research Project," it is clear that union participation in worker education and training initiatives is increasing.

The positive response to the first question of the importance placed on WET by unions generally, is not matched when looking at the importance given to specific aspects of worker education and training by the respondents' own union or labour body. The researchers identified at least two possible reasons for this seeming contradiction. First, we considered that many and possibly most respondents included union education in the concept of worker education and training. Second - related to the first - we concluded that a better design of these questions would have clarified the intent. At the same time, there are some unions whose activities include basic skills projects but not skills training, and those with other variations in emphasis on aspects of worker education and training.

The majority of questionnaire participants felt that their union gave a lot of importance or saw as a top priority basic skills (57%) and skills training (60%). There was much lower importance attached to public education partnerships (30%), career transitions (26%), and sector councils (23%).

While there is increased understanding of the benefit of being pro-active on adjustment, many note that union activity on adjustment "waxes and wanes with economic change" and "loses priority when not in a crisis situation." 48% of participants recorded that their union gives a lot of importance to or sees adjustment as a top priority.

One focus group participant commented that members would say skills training is at the top of their priority list, but that leaders view training as the responsibility of the employer. In "my union [broader public sector] training is a priority ... In the last membership survey, training was number one and pay was number ten."

Lack of structural support hampers continuous union involvement in worker education and training. Organizational stability is needed, of the sort now provided to grievance arbitration or health and safety. Compounding this situation is financial instability and varied government/employer support. Many pointed to cuts in government commitment and funding, uneven employer support or lack of support, with expected consequences.

As one coordinator noted: "There is certainly more awareness now about the need for worker education and training than there was 10 years ago. Workplace change, restructuring and closures have forced some unions to respond to this growing need in a variety of ways, and several national unions and federations of labour have literacy projects in place. The challenge remains to integrate this kind of programming into the mainstream of union consciousness and activity."

Learning and Training Background

Coordinators draw on a wealth of knowledge and experience in their day-to-day work. Their learning and training background is diverse. The research project sought to identify the various strands of coordinators' learning, including both formal learning (formal and non-formal education) as well as informal learning:

- formal education: learning derived from the secondary and post-secondary credentialed education system
- non- formal education: organized courses offered by a host of sources, from union courses to community-based training workshops, to professional development courses offered by colleges, universities, non-profit and private trainers, etc.
- informal learning: intentional learning that is done outside of school and organized courses

Most coordinators bring a labour activist background to their current job:

73% labour activist
56% community organizations
48% adult education
30% human resources/training
23% management

Several respondents noted their trade or technical background, related to the type of program offered by their project. There were many other backgrounds noted by respondents.

Formal Learning

80% had some formal training for the job they now do.

- 30% had taken a short course or workshop (only)
- 14% had taken a certificate, diploma or degree program (only)
- 36% had taken both

For those who had formal training, over half received staff training from their union or labour employer.

- 52% union staff training
- 37% community college
- 37% university
- 26% community-based training

Many respondents noted union, Canadian Labour Congress and other labour- sponsored courses and labour education as part of their formal training.

For those who had formal training, relevant know ledge or skills acquired included:

- 70% adult education methods
- 68% labour and workplace culture and politics
- 65% presentation skills
- 62% train the trainer
- 62% planning
- 60% diversity and equity issues
- 58% interpersonal skills
- 55% program evaluation
- 53% computer skills
- 52% analyzing skills
- 36% financial administration

However, when asked if they had found any training programs or resources from college, corporate, or community-based organizations that are useful in meeting their learning needs as a project coordinator, only 49% said yes. One participant remarked: "We need class, feminist, labour analysis, not available outside the labour community."

College and university courses were particularly noted in the areas of:

- adult education
- human resources management
- organizational studies
- community development
- social services (including counselling)

Non-profit institutions and organizations were mentioned in connection with training in the areas of:

- conflict resolution
- marketing
- literacy

In addition, participants mentioned the usefulness of resources or training from Help Centres, professional development organizations, the B.C. Open Learning Agency, the Association of Joint Labour/Management Educational Programs (U.S.), and the conflict resolution training offered by the Justice Institute (B.C.).

Informal Learning

Participants learned many of their project coordination skills and knowledge of education issues through informal learning - learning outside of formal courses and workshops. A wide variety of methods was described. Many identified particular things that they had read or particular authors who had inspired them or helped them learn something vital to their current work. Examples range from Tommy Douglas, Grace Hartman and Paulo Freire to the publications of the CLC Workplace Literacy Project and labour writings on training issues. Reading, researching, on-the-job learning from peers and mentors, as well as volunteer work, negotiations, conferences and networking were among the many sources of informal learning.

As one education and training coordinator stated: "Having a network of colleagues involved in the same field is indispensable. Much of my informal learning was the direct result of attending conferences where I had the opportunity to meet and talk with other people involved in the same work as I was. This is important because you share information, swap stories and give each other advice ... by hearing someone else's experiences you learn new techniques and skills."

Just as coordinators credit their own informal learning, they also recognize the learning of the workers whom they serve: "People, no matter what kind of job they have and what kind of person you think they are, always have knowledge and skills that you didn't expect. ... it seems such a waste that so many valuable skills are wasted (or undervalued). People need to be able to use these skills and experiences in their own lives and especially in their learning environments. The people providing the training or 'formal' education need to listen and incorporate this diverse and valuable experience."

Profile of Effective Coordinators

Focus group and questionnaire participants were asked to describe the knowledge, skills and personal characteristics needed to be an effective education program coordinator. We developed this profile in order to understand better the elements of an effective coordinator and to move toward identifying the education and training that could further support those skills and that knowledge. The researchers have grouped the comments into dominant themes and the most frequently cited are highlighted in the boxes below. (The individual features are not in any particular order.)

Knowledge

- labour and workplace culture and politics
- diversity and equity issues
- adult education
- program design, planning and evaluation
- financial administration and budgeting
- education and training funding and resources
- content offered/developed for project

Effective coordinators have a keen knowledge of labour and workplace culture and politics. They need an "understanding of the workplace and the continuing changes and the effect on the members' literacy, essential skills and job skill needs." They need "wisdom from life experience," previous involvement in labour and union issues, an understanding of labour history, values and principles, of the union's priorities and current campaigns. They build on their knowledge of social justice issues, "striving as educators to always make the connection between awareness on issues and taking action."

Effective coordinators have an understanding of the role and potential of worker education and training in labour's struggle, and how to integrate education and training into union culture.

Effective coordinators need to be "politically savvy", "sensitive to political issues within locals and within the union." They need a "working knowledge of who the main 'players' are and what are their concerns." They "need to find out hidden agendas; dealing with politics is not so easy."

Joint labour-management programs hold special challenges. Coordinators "need to dance," stay neutral with the different stakeholders. They "can't be seen to be only on one side, they need to ride a middle line and be diplomatic." At the same time, coordinators need to understand the "methods companies are using to weaken the union using these same areas and course methods." Given the difficulties inherent to joint programs, coordinators need to "focus on needs of the workers and make resources available for them."

Effective coordinators need to be sensitive to different cultures, be able to relate to workers and their diverse backgrounds. They need to know "how to build solidarity and utilize diversity."

Effective coordinators need to identify the systemic and other barriers related to training and education programs. These barriers are many: gender, race, language (including barriers faced by francophones from Ontario, New Brunswick and Manitoba), literacy (including in first language), age, ableism, heterosexism, class and job classification biases, geography, computer ability and access, etc.

Effective coordinators have knowledge of adult education, "all the background in what happens in a classroom." They need to know program design, planning and evaluation, to "understand learning and its cultivation." They need to understand finances, and often legal responsibilities. They need to know the education, training and funding players: the public education system, community groups, other unions, employers, government programs. They need to know the material, the content of the courses being offered, as well as industry changes. The trades need coordinators with a trade background, who have "an understanding of work area, terminology, jargon ... and understanding and appreciation of the culture."

Skills

- planning
- organizational
- coordination
- interpersonal
- communication
- marketing (including promotion and networking)
- human resources/management
- analyzing
- negotiating
- computer

Effective coordinators need planning, organizational and coordination skills, to "set timelines and develop a detailed workplan." They need research, critical thinking and analyzing skills, an "ability to piece together interrelated issues that meet current and future membership needs and wants."

Effective coordinators need "great people skills so that workers feel comfortable and self-assured and believe that they can be successful." Coordinators need to communicate effectively with a wide range of people, from rank and file members to union leaders and CEOs. Their communication skills encompass writing (funding proposals, research, technical), clear language (promotional material, newsletter, website), listening, networking and presentation skills. Coordinators need to ensure materials are translated into the various languages of the workplace.

Communication skills are linked to marketing and negotiating skills, promotion with the union and employers. Coordinators need to know how to "schmooze", how to sell themselves and their projects to different audiences. They need to know how to "get on the agenda, finding the right place to integrate and plug the project with existing activities and priorities of the organization."

Effective coordinators are able to collaborate and work as part of a team. They often have to be managers, coaches and mentors of other people, with skills in conflict resolution, hiring, training and developing others. "You need to understand your own limitations, be realistic, delegate authority." Coordinators need to master personnel management techniques from a progressive angle. "You need good support staff, it's not a one person job."

Personal Characteristics

- flexible
- resourceful
- supportive
- good-humoured
- visionary
- persistent
- self-starter, highly motivated
- energetic, passion for job
- leader, catalyst

Effective coordinators are able to "go with the flow," juggle priorities and be adaptable. They are problem-solvers, have "scrounging abilities" and use contacts for help when tackling new problems. "They don't need to be an expert on all issues. The union has many resources that can assist the coordinator. They must be able to access those resources."

Effective coordinators are supportive of students as well as of program instructors, counsellors and other staff. Caring and encouraging, coordinators need to conduct themselves "in a businesslike manner, sensitive to expectations and decorum, suspend your own values, [be] non-judgmental, open." They are good listeners, empathetic "without letting other people's problems take over your life."

Effective coordinators are creative, imaginative, "able to 'think outside the box.'" They are tenacious, "not easily discouraged." They take initiative, have "a good balance of confidence and humility, a self-starter, at ease with open-ended situations, able to see the big picture while also working at a micro level."

Effective coordinators are "totally committed to the program" and have enthusiasm and "super high energy to cope with workload." They are able "to enjoy and have fun while working towards each goal of staying in touch with the membership, the unorganized workers and the communities that we live and work in."

Effective coordinators are leaders, decision-makers, keep to goals without getting distracted. A leadership role means different approaches in various locations and contexts. Sometimes it means playing a facilitator role, "massaging things till something comes out." Coordinators are able to develop and motivate others. They are able "to build and support ownership of the education initiatives; plant the seed but let them nurture and grow the garden."

Discussion

The composite profile of an effective coordinator is truly impressive.⁷ In large part, developing a profile is an arbitrary exercise. As researchers, we wrestled with the concept of personal characteristics and attributes. Other studies refer to attitudes or aptitudes. All seem to imply that there is a "given" part of one's personal identity, which we're born with or at least can't change. Personal characteristics, like knowledge and skills, are fluid and relational, developed and used in a social context.

Further, how does one decide how to categorize particular qualities? Most qualities are inter-related and there is overlap in the categories of personal characteristics, knowledge and skills. For example, "resourceful" may be a personal characteristic, but it is also a skill that can be learned, as is knowledge about available resources. The analogy of heart, mind and body - making up the whole person - can help to better appreciate these distinctions and inter-relations.

Though coordinators will recognize themselves in the profile above, taken together the picture may portray a "super-person" and seem somewhat intimidating. Without judging a single individual on all of the criteria described, the profile can nonetheless be helpful for the following purposes:

- to better understand the elements of an effective coordinator
- to subsequently identify and develop the education and training that support those skills and that knowledge
- to assist when developing hiring and evaluation tools

The personal characteristics, knowledge and skills of effective coordinators are further revealed in the ways coordinators tackle the many challenges they encounter on a daily basis.

Common Challenges, Sharing Strategies

Coordinators face a host of issues. The researchers have grouped participant comments into dominant themes and the most frequently cited are highlighted. Challenges include:

- finding resources and keeping them up-to-date
- finding, interviewing, training and keeping good instructors and tutors
- a variety of specific program and learner needs and issues
- need for feedback: "Lots of people would like to consult on lots of things but workload is a common problem. Because of this we often do not get the kinds of organizational feedback that we need in a timely manner. Often you are left on your own making decisions based on common sense and union principles that can impact on thousands of people. This can be problematic."

Four general strategies and resources stand out from the many methods coordinators use to meet the challenges of their job:

1. research, reading
2. networking, discussing challenges with:
 - colleagues
 - program participants
 - others in the field
 - resource people
 - labour studies programs
 - Canadian Labour Congress, provincial federation of labour and labour council project staff and leaders
 - labour friendly MPs/MPPs
 - retired labour leaders and activists
 - a mentor you can be completely open with
3. "just do it"
 - "flying by the seat of my pants" ... "ask a lot of questions, then do it and duck" "wing and a prayer method of survival" ... trial and error, learn as I go be creative ... "don't hesitate to try, mistakes are better than doing nothing or pleading ignorance" "beg for forgiveness, not for permission" ... "suck it up" ... dig in make the solution fit the problem
 - A word of caution about "winging it": "participants will realize that you are not prepared and they are not getting quality programming even though they are giving a good effort. Don't do it if it is not quality."

4. inclusion, utilize others' strengths
- create partnerships
 - involve people in decision-making
 - work closely with the joint education committee and centre tutors: "all of us together can usually find solutions"
 - develop a working group or reference group
 - get support from other department members
 - "create networks where they don't yet exist and nurture them"
 - build relationships, both formal and informal, with people within your organization
 - work through your constituency, i.e. the people outside but connected to your organization who want this work to happen, and who have some leverage with your organization
 - distribute directions/thinking pieces to wide audience for feedback and consultation

Experience Speaks

- ❑ keep cool and calm: "your ears never get you in trouble"
- ❑ think positively, act confidently
- ❑ be informed: keep your ear to the ground
- ❑ need credibility without being too cautious, need to rise to the occasion
- ❑ be clear with your position: back up information with concrete things

Many participants offered specific strategies and resources for some common, key challenges:

Challenge: Too little time, too much work

- Burnout caused by workload stress
- Hard to juggle and keep focused
- "balancing the 'doing' (teaching) with my roles as coordinator - managing and evaluating staff, planning, budgets, visioning, etc."

Strategies/resources

- short-term action plans
- "break up task into smaller pieces to see where I will need help and what I can pursue on my own, then search for information and resources"
- "You must always remember that an elephant can only be eaten by taking a bite at a time."
- try to delegate work
- take that extra time, step back; "don't say 'yes' right away when asked to do something, rather say you'll get back to the person: it helps when you have a chance to sleep on your decisions"
- "prioritize! prioritize!" "define and stay in touch with your 'constituency', which helps define and clarify priorities"

Challenge: Getting union buy-in and support

- getting on union staff meeting/union decision-makers' agenda
- getting buy-in from board
- "though the project is seen as important by decision-makers, it's just one more thing for the people I have been assigned to work with"
- lack of support from senior managers, union executive
- area not especially understood or valued in the labour movement, bottom of priority list
- leveraging the full potential of the union structure in the workplace
- helping union activists understand the complexity of process
- stopping union activists from making processes unwieldy
- helping union activists understand the pitfalls of jumping into job skill training without forethought

Strategies/Resources

- "look at the overall work of the organization in terms of where there might be overlapping interests, e.g. labour education, women and human rights, health and safety, and cultivate potential collaborations"
- create and pursue opportunities for the elected leader responsible for your project to connect to your work, e.g. through speaking engagements, meetings with government funders, participation at meetings of your committee
- find ways to include your issue in leaders' speaking notes, prepare brief snippets for them to include
- work with your communications people to include news about your issue/project in newsletters, communiques
- "I try to get some funds (to bring tutor coordinators together) from other groups and committees within the union. In this way, the other group members become more supportive of basic skills as they learn more about the value of these programs."

Challenge: Equity and access issues

- "many labour educators struggle with finding effective ways and comfort levels to be able to facilitate and participate when issues are raised that deal with systemic barriers"
- "There is discrimination based on geography, we live it every day. For example, we have a local that only has direct access to the union once or twice a year [because it's so geographically remote]. Small locals find participation expensive."

Strategies/Resources

- In a male majority union, "it was a challenge to get more women active. When [an anti-harassment] course for only women was first proposed, there was a big initial backlash. After a few years, visible minority women asked for their own course. Also a backlash; separate courses were seen as divisive. Now, five to six years down the road, we see it was right to have separate courses. They were more effective. We have many more visible minority women active and in leadership. We need to allow people their own space. It helps bring people into the fabric of the union."
- "We've had train-the-trainer of equity group members: one day in adult education, then one day for the particular union course."
- "In our workplace program, we found some 'self-discrimination', people keeping in their own groups. There was a 'class culture' based on jobs and the fact there are different unions in the workplace. This was seen as a barrier. So in one learning program that required shared accommodation, we organized accommodation to totally integrate participants by job occupation, geography, different unions, etc."
- "Sometimes written translation is not useful as many members are illiterate in their first language. So we hired bilingual instructors."
- "We're revising all our educational manuals so as to integrate anti-racism. We need to always update instructors, at least once every two years."

Challenge: Money

- There are continuous tensions between what is possible and what is needed. We face "shoestring budgets with towing rope needs."
- It's a challenge to draw up a budget, prepare funding proposals, activity and financial reports to government.
- For many programs, there is no long-term security. Uncertainty makes it hard to hold on to good people. It's hard to cope "with the precarious, grant-dependency of my job."

Strategies/resources

- Due to declining union membership we face declining dollars in our bargained training fund. So we pool resources with another training centre and embrace other union members not in the bargaining unit [covered by the training fund].
- Seek out government programs; though they are insufficient and hidden there is some money available.
- Partner with industry so as to get their financial contribution.
- Find someone skilled to prepare the financial reports.

Challenge: Joint Programs

- coordinating and chairing joint committees
- working with partners
- balancing union and employer and participant interests: dealing with differing perceptions and expectations of people involved
- "dealing with two 'bosses', management and unions"
- getting management to view me as a peer, not one of them
- union problems, union infighting, hidden agendas
- to develop a good training program (objectives, curriculum, delivery methods, etc.) and receive management cooperation without compromising the program
- commitment by management to uphold principles established in bargaining pertaining to the training program

Strategies/resources:

- use bargaining strength, local and national union support when dealing with management
- make sure you consult with the union
- coordinator's role in joint process is to play the role of mediator with fairness and equity, politely and consistently:
 - listen to union and management and provide empathic response and creative solutions
 - "identify 'what's in it for me' and address to satisfy stakeholders - each side must 'win' something, neither side (union/management) is more important than the other"; see that everyone gains, however little
 - try to get people to focus on task; different paths, common end point
 - put aside differences, pull people together, build consensus

Challenge: Planning for the Future

One of the more basic yet difficult challenges is to look to the future rather than just being reactive. How can we get people to "blue sky it," and keep the focus on the long-term objective? Sometimes this challenge takes the form of a lack of clarity in goals and expected outcomes, a misfit between priorities and mandate. On this question there are few suggested strategies and resources. Perhaps what we seek is a way to integrate strategic planning into the ongoing cycle of program development and evaluation.

Future Professional Development and Training

Participants were asked what training topics they would like to pursue, what issues and topics they wished they had more time to reflect on. Twelve main issues emerged, of which the first three got the most response.

- program development and management
 - current practices and implementation issues
 - resources
 - curriculum, including "how to integrate union awareness and empowerment into every day curriculum in a way that generates critical thinking but not in a heavy-handed way"
 - evaluation
 - planning for the future
 - politics of lifelong learning, research on training and basic skills
- communication skills
 - writing reports, proposals and briefs
 - public speaking
 - language and cultural barriers to communication
- marketing / recruitment and retention issues
 - how to integrate basic skills and skills training into the "main business of the union" and a priority for all levels of leadership and staff
 - creating "buy-in" with your members, "ways to reach out, contact, inspire and activate more union members and activists to spread the message and increase the number of programs and learners"
 - "selling" programs to unions, employers and government

- equity and access issues
 - ensuring inclusiveness and accessibility in different areas of education and training
 - cultural sensitivity, diversity training, human rights awareness
 - social inequality issues and biases in our educational settings
- money
 - funding: fundraising, bargaining, negotiating for government funding
 - budgeting and financial administration
- joint programs
 - advanced joint committee training: growth, development, leadership
 - conflict resolution
 - dialogue/negotiations with employer
- coordinators as managers
 - interpersonal aspects, labour relations
 - formalization of policies and procedures
- Prior Learning Assessment and Recognition (PLAR)
 - recognition of union education and experience
 - how to integrate non-credentialed prior learning
 - for coordinators: recognition of our skills
- networking
- labour education/labour issues
- distance learning
- computer software

The training topics relate directly both to the challenges coordinators face and to the knowledge and skills of effective coordinators described by participants. The topics include several also mentioned by participants as gaps in job-related training they have experienced. For example, training that coordinators had to go outside the union community for includes technical (especially computer skills), financial management (including budgeting), conflict resolution, human resources management and program planning and management.

At the same time, several of the topics - such as communication skills, joint programs and marketing/recruitment and retention issues - are not among the knowledge or skills coordinators reported acquiring through the formal training they have received so far for their job.

As important as the topics for training, is the way training is delivered. Participants were asked what could help them integrate what they "know" into what they "do."

Training should be interactive, hands-on, relevant, focused/limited.

- bring current workplace situations to the training as examples and assignments: think about connections between what I learned with current situation
- integration has to happen in the moment: need active participation in the training itself
- practical workshops focused on something produced, "make and take"

Training materials should include "how-to-do-it" bullet summaries.

- tips: clear, short, bullet points, "we do wallet cards with key points for people to take away with them"
- include a manual or reference binder, "well-organized and concise with space to add my notes to the handouts"; "take notes to reflect how I would teach the course, what worked/what didn't"
- include a calendar of when to use material, how to use it and a checkback column to show when you use material

Share the knowledge after the training.

- write about it in local union paper, educate others by talking about what you learned
- report to co-workers, "maybe re-do the presentation which helps you internalize information"

Immediate implementation after the training.

- narrow down training to two or three key elements that I can use in my work and start using right away
- look for situations to integrate new information into current work: "put yourself out to try new skills, set up practice exercise to use knowledge gained"
- intersperse modules with practice/distance education: during the down time, consider how the course fits into your organization and what needs to be done to facilitate that. Some of the work could be done in the middle internet period and be guided and discussed.

Include training follow-up.

- "study buddy"; "internship" at end of course, such as job shadowing, mentoring; have a "coach" or representative from the school or training source oversee the project and give feedback. Have someone follow up ongoing projects until the planning skills are fully integrated. Partner with course facilitator or someone in executive level of project organization to ensure that everyone's interests and goals are accommodated.
- a quick "check-back" with course participants a month later (conference call, results of written survey, etc.)
- have website for people to contact; inventory of resources shared across the country
- follow-up workshop/training session a few months later: structured time to meet with others around the issue, to compare experience, share strategies around how training was put into place, reflect and evaluate with others

Various options for training delivery were offered. Most respondents preferred a one week residential course (57%) or weekend workshops (56%).

49% list serv: network allowing sharing of expertise, opinion

46% distance education

43% part-time during the day

43% part-time during the evening

31% 2 week residential course

Conclusions and Recommendations

There is substantial union activity in worker education and training projects. These projects in turn need to be managed and coordinated by union elected leaders, staff and activists. However, as seen in the research, there are currently too few opportunities for WET project coordinators to develop their professional skill.

The following recommendations are intended to generate discussion on ways and means for the labour movement and others to address this important issue.

1. *Encourage union forums to promote the value of WET project coordination and to recognize the skills and knowledge it requires.*

Clearly acknowledging the skills and knowledge required for a particular occupation is an important factor in affirming its value. Many respondents were unsure as to the recognition and value their unions placed on their activity. Union conferences and conventions, staff meetings at the national, regional and local union levels, and union education courses are ideal forums in this regard.

2. *Unions, LEC, CSEW and other interested parties should convene a series of meetings to discuss the report findings, and propose training and professional development for WET coordinators based on their suggestions outlined in this report.*

Questionnaire respondents identified a lack of formal training and professional development opportunities for WET coordinators. They noted that much of their learning has been informal, such as learning on the job or from co-workers and colleagues. Though respondents identified some union and post-secondary education courses that had helped them perform their jobs in a general sense, there appears to be a real need for "job specific" professional development opportunities and training courses for WET coordinators.

3. *Proposals for training or professional development resulting from these research discussions should include both skill development and methods to regularly exchange information and provide mutual support.*

In the area of practical skills, respondents identified such areas as: program development and management; communication skills; marketing, recruitment and retention issues; equity and access issues; money; joint programs; and coordinators as managers. In the area of information exchange and mutual support, respondents identified such areas as networking opportunities, a listserv and website resources.

4. *The format for any proposed training and professional development opportunity should be both interactive and flexible.*

Training should recognize and build on prior learning and life experience, be hands-on and focused. Union work for elected leaders, staff and volunteers is known to be intensely demanding with long hours and competing demands. For many respondents, WET coordination was only one of several union duties. Training should therefore be offered at accessible times such as weekends, brief periods, evenings, etc.

5. *Continue the broader debate concerning the role of worker education and training in the changing global, political and economic landscape.*

Much discussion about this has occurred in the labour movement during the past decade, though unions continue to have divergent views about the relationship between worker education and training and the "knowledge economy" and globalization. There is no overall consensus as to whether or not unions should be directly involved in WET. The issue of the training and professional development needs of WET coordinators can only be considered within this broader context.

6. *Devise ways and means to integrate worker education and training into the broader education and organizing agenda of the union.*

A common theme in the research discussion was that worker education and training is often viewed as marginal to the broader union agenda. Based on the findings and other sources, this seems to be largely due to two common factors. First, WET must compete with many other priorities, especially the demands of servicing and organizing members. Second, except on a policy level, WET is considered to be a government or public education responsibility rather than a union responsibility. However, some unions have begun to connect WET to their broader education and organizing agenda, viewing it as a means to raise member consciousness and build union strength, equity and solidarity.

For WET to become more central to the union agenda, it will be crucial to find ways to link it to existing priorities. How this is accomplished will vary among unions. In some unions, integrating WET into the union education framework will increase its visibility and importance; in others, linking WET to organizing new members may be more effective. In any case, the further development of worker education and training will need to be related to the overall strategic planning processes of the labour movement.

Appendix 1
Information Letter

MLEC Lifelong Learning Project

The Metro Labour Education Centre would like your help for our new "Lifelong Learning" project. We would like to include you in the research component, described below, which will be conducted across Canada (though not including Quebec). MLEC is the education project of the Toronto and York Region Labour Council. We offer a variety of education and training services to unions, union members and unemployed workers.

We'd like to offer an opportunity to share experience and develop skills with others who direct projects inside the labour movement, in one of the following areas:

- basic skills, including literacy, English upgrading, English as a Second Language, basic computers, GED preparation (secondary school diploma equivalent)
- adjustment services for workers facing layoff or plant closure
- career transitions - labour market trends, assessment, resume writing, etc.
- information about and partnerships with the public education system
- skills training

At this point, we need to know if you or others in your union are engaged in such projects, and whether you could do an interview on your experience later in the fall. In any case, please let us know if you want to be plugged into this information-sharing network.

Action Research

The Lifelong Learning project has several components with the overall goal of building union capacity to assist members and their families to access information, resources and programs related to all areas of training and education.

The project includes an "action research" component in partnership with the Ontario Institute for Studies in Education/University of Toronto. We will work with union coordinators and managers of education and training programs across Canada (not including Quebec) to research their current professional development needs. In the project's second year, we hope to organize a 2-week course, based on the needs identified in our research and adapting resources from courses and workshops on non-profit management as well as training of union staff in the area of managing and coordinating worker education and training projects.

Why?

Most of us working in this area got our jobs due to our union activist background. We don't necessarily come to the new job with management and coordination skills. We learn as we go, from colleagues and so on.

Thinking of Metro Labour Education Centre staff as an example, in the early years we mainly learned by doing, with help from colleagues. Into the mix and over the years we can add staff professional development sessions, participation in conferences, management funding for off-site relevant training, etc. When our Executive Director or Program Coordinators want to learn how to be a better executive director or coordinator, there's no labour-focused relevant training. There's post-secondary or community-based "non-profit management" programs, courses and workshops.

To better understand how to meet the need for staff to learn project coordination skills, we will explore:

- how unions do strategic planning and management
- ways to form partnerships with employers and government and relationships with stakeholders
- how to plan, deliver and evaluate training and worker education programs
- fundraising, bargaining training, financial planning
- project administration, reporting and accountability

The first year (till March 31/02) of this part of the project will:

- identify union projects and staff
- research the ways unions use to develop project management skills
- identify gaps and areas people feel need to be improved
- research courses that may have relevant content
- develop a skills and knowledge profile for union project managers
- define course content and format for a 2 week course for union project managers to be organized and delivered in the second year of the project

The 2-week course is aiming for 50 participants from across the country (outside Quebec). At this point we don't have a fixed idea of the format or specific content -- that will be developed based on our research with project coordinators. Perhaps there will be a one-week common content with a number of 1, 2 or 3 day workshops reflecting specific areas of interest.

First Step

The first step in our research is to compile an "inventory" of union projects (both independent union-sponsored as well as joint labour-management programs) in the area of worker education and training. We're building our contact list for the research to begin later in the fall. We are looking for people who:

- are paid staff, or who are activists brought in on a project basis to work on education and training programs
- may have other responsibilities but whose portfolio includes one or more of the program areas
- work with more than one workplace
- may represent your union on sector councils or other joint labour- management initiatives

We very much appreciate any help you can give us. In return, we hope our project will help your union by assisting and supporting the development of capacity of staff who run training programs. If you have any questions or comments, we'd welcome your thoughts. We'll be in touch again later in the fall.

Thank you. In Solidarity

Anna Larsen
Education Developer
Metro Labour Education Centre
416.537.6532 ext. 2204
alarsen@mlec.org

Appendix 2
Questionnaire Package

November 2001

Dear Research Participant:

Over the past few years there has been growing interest in establishing union-sponsored lifelong learning programs. Many unions, like yours, have taken practical steps to develop worker education and training opportunities for their members. You have been selected as part of a small representative sample of labour educators. Many other union activists want to learn from your experiences to aid in moving ahead with their own plans.

The Metro Labour Education Centre and the Centre for the Study of Education and Work (Ontario Institute for Studies in Education/University of Toronto) have established a partnership to assist in building the capacity of the labour movement to initiate and manage worker education and training programs - and we need your help.

We are hoping that you will help develop this vibrant labour education movement by completing the questionnaire that we've enclosed. The information you give will be completely confidential and will help other labour educators avoid needless mistakes while trying to create new ways to empower Canadian union members.

Please complete and return this confidential questionnaire within the next 10 days. Thanks.

In solidarity,

Janet Dassinger
Executive Director
Metro Labour Education Centre

David Livingstone
Director
Centre for the Study of
Education and Work
(OISE/UT)

November 5, 2001

Lifelong Learning Action Research Project

Conducted by the Centre for the Study of Education and Work (CSEW), Ontario Institute for Studies in Education/University of Toronto in conjunction with the Metro Labour Education Centre (MLEC)

Contact Persons

Sheila Stewart, Senior Research Officer, CSEW:
416.923-6641 ext. 2352 email: sstewart@oise.utoronto.ca
Anna Larsen, Education Developer, MLEC:
416.537.6532 ext. 2204 email: alarsen@mlec.org

This research project is intended to document current worker education and training programs conducted by Canadian unions and identify professional development needs of program coordinators and managers. This research is funded by Human Resources Development Canada and conducted by CSEW and MLEC under the leadership of an Advisory Committee composed mainly of labour leaders.

You have been selected as a knowledgeable program coordinator to summarize your views on these matters. Your participation is very important if we are to produce a truly representative profile of the current situation from a union standpoint.

We ask you to respond to the attached questionnaire which should take less than one hour. The questionnaire is provided in MS Word 97, WordPerfect 9, and a hard copy is being mailed to you. Please select whichever version is most convenient for you. If you choose the email version, you must save the questionnaire as a file on your computer and then attach it in your reply - your answers will not appear in your email to us if you just save in the original attachment.

Please return the completed questionnaire by Friday, November 30, 2001

We may also ask you to do a follow-up interview, or to participate in a focus group. In all cases, the confidentiality of your responses will be assured and no specific information will be attributed to you personally. If you agree to participate under these conditions, please sign the attached consent form.

We will send you a summary of the findings in the new year. Thank you very much for your time and participation.

**Metro Labour Education Centre
Centre for the Study of Education and Work (OISE/UT)
Lifelong Learning Action Research Project**

Consent Form

I hereby agree to participate in the research project called "Lifelong Learning Action Research Project" by providing information in response to a questionnaire or interview.

I understand that any information I provide will be treated confidentially and will not be attributed to me personally.

Please sign your name:

Date:

**Please return the Consent Form with your completed questionnaire.
Thank you.**

**Metro Labour Education Centre
Centre for the Study of Education and Work (OISE/UT)
Lifelong Learning Action Research Project**

Questionnaire

A. Who You Are / Your Organization

1. Do you work as a learning project coordinator:
 - full-time
 - part-time
 - permanent
 - contract
 - as one of several duties
2. Does your worker education and training project include:
 - basic skills
 - career transitions
 - adjustment
 - partnerships/info about the public education system
 - skills training
 - sector councils
 - union education
 - other (please specify):
3. Is your current project:
 - joint union-management, or
 - solely union-based
4. As far as you know, how is your project financed? (If you know the percentage of financing from the following sources, please indicate.)
 - negotiated training fund
(e.g. collective agreement, training trust fund)
 - government funding
 - foundations
 - union dues
 - registration fees

B. Place of Education Within Your Union /Labour Body

Thinking about the union or labour body that sponsors your project, let's look at the place of worker education and training in your union or labour body today. Indicate your opinion about the following statements by putting in the blank a number from 1 to 5.

1. Strongly disagree
2. Disagree
3. Neither agree nor disagree
4. Agree
5. Strongly agree

Worker education and training:

1. is a key part of your union's agenda ____
2. is and explicit goal of leadership ____
3. is a regular item in discussion of reps and bargaining of committee ____
4. has an allocated budget and specialized staff ____

Thinking about the union or labour body sponsoring your project, let's look at the importance it gives to specific aspects of worker education and training. Indicate your answers to the following questions by putting in the blank a number from 1 to 5.

1. None
2. Very little
3. Some
4. A lot
5. Top priority

What importance does your union give to:

5. basic skills ____
6. career transitions ____
7. adjustment ____
8. partnerships with public education system ____
9. skills training ____
10. sector councils ____
11. On a larger scale, what changes have you seen over the last 5 to 10 years in terms of the importance unions place on worker education and training? Be specific. ____

C. Skills and Knowledge Profile

1. What attributes or personal characteristics make for an effective education program coordinator? (e.g. flexible, resourceful, supportive, visionary ...)

2. What knowledge does a coordinator need? (e.g. adult education methods, program evaluation, diversity and equity issues, labour and workplace culture and politics ...)
3. What skills does a coordinator need? (e.g. planning, interpersonal, presentation, marketing, analyzing ...)

D. How We Learn

1. We are interested in the background you bring to your job. What was your previous employment or activist background?
 - ___ labour activist
 - ___ community organizations
 - ___ management
 - ___ adult education
 - ___ human resources/training
 - ___ other (please specify):
2. What kind of formal training, if any, did you get for the job you now do?
 - ___ none
 - ___ short course
 - ___ workshop(s)
 - ___ certificate program
 - ___ diploma or degree program
 - ___ other (please specify):

If your answer to question 2 was none, please go to question 5.

3. If you had formal training, where was it?
 - ___ staff training from union / labour employer
 - ___ community-based training
 - ___ community college
 - ___ university
 - ___ other (please specify):

4. What are some of the relevant knowledge or skills you acquired?
 - ___ adult education methods
 - ___ train the trainer
 - ___ program evaluation
 - ___ diversity and equity issues
 - ___ labour and workplace culture and politics
 - ___ planning
 - ___ financial administration
 - ___ computer skills
 - ___ interpersonal
 - ___ presentation
 - ___ analyzing
 - ___ other (please specify):
5. Please identify particular things that you have read or particular authors who have inspired you or helped you learn something vital to your current work.
6. What major "learnings" happened outside of formal courses and workshops?

E. Your Experience on the Job

1. Please describe some of the major challenges you have faced as a project coordinator.
2. What strategies and resources do you use to tackle such challenges? (e.g. when you are suddenly handed responsibilities that you have little preparation for, how have you faced this situation?)

F. Your Own Professional Development / Training

1. What gaps in training have you experienced -- job-related training that you had to go outside the union community for (e.g. technical skills, program management, budgeting)?
2. Have you found any training programs or resources from college, corporate, or community-based organizations that are useful in meeting your learning needs as a project coordinator?
 Yes No
3. If yes, please identify the specific programs and their source.
4. Thinking about training you would like to participate in, what additional topics would you include?
5. How would you like the training delivered? (check as many as you like)
 list serv: network allowing sharing of expertise, opinion
 distance education
 2 week residential course
 1 week residential course
 weekend workshops
 part-time during the day
 part-time during the evening
 other (please specify):
6. You may have faced the situation where following a training session your notes go in the filing cabinet and you feel like you have "forgotten" or can't use whatever you learned at the training. What can help you integrate what you "know" into what you "do"?
7. What issues and topics do you wish you had more time to reflect on?

References

Note: Papers and other documents from NALL, referred to below, are available on the NALL website: www.nall.ca

¹ The relevant Canadian literature on worker education and union education includes the following:

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"Toward a Union Vision of Workplace Training," CLC National Training Conference, Ottawa, June 25-27, 1997.

- ❑ Research Paper #1, Janet Dassinger, "Introduction to the Issues: A CLC Survey of Union Attitudes Toward Training"
- ❑ Research Paper #2, Louise Miller, Quebec Federation of Labour, "The Training Situation in Quebec - Response to the National Survey"
- ❑ Research Paper #3, Ursule Critoph, Canadian Labour Force Development Board, "Background on the Training System in Canada"
- ❑ Research Paper #4, John Anderson, "A Labour Agenda on Training Funding"

² For example, see the Resources, Library and Learn sections of the Charity Village website (which describes itself as "Canada's supersite for the nonprofit sector"): www.charityvillage.com

³ Yoland Wadsworth, "What is Participatory Action Research?", Action research international, November 1998 www.scu.edu.au/schools/sawd/ari/ari-wadsworth.html

Dorothy Wigmore, "Action research: starting to ask 'why' questions that connect knowledge and power."

⁴ Matt Adams et. al., "Preliminary Bibliography of the Research Network for New Approaches to Lifelong Learning (NALL)," NALL Working Paper #01-1999, <http://www.oise.utoronto.ca/depts/sese/csew/nall/bibliolindex.htm>

Nyranne Martin and D' Arcy Martin, "Funding for Training: An annotated bibliography," Centre for Research on Work and Society, Training Matters: Sources and Resources, #SR-00-02.

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Sue Vanstone et. al., "Publications and Resources on Prior Learning Assessment and Recognition (PLAR)," Compiled for the Research Network for New Approaches to Lifelong Learning (NALL), Centre for the Study of Education and Work, July 1999.

⁵ See for example, Tom Nesbit, "Educating labour's professionals," *Relations Industrielles/Industrial Relations*, 56,4 (2001): 676-700.

⁶ Allen Tough: Based on "Reflections on the Study of Adult Learning: A brief talk at the 3rd New Approaches to Lifelong Learning (NALL) Conference, Ontario Institute for Studies in Education of the University of Toronto," February 19, 1999, NALL Working Paper #08-1999.

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⁷ The personal characteristics, knowledge and skills described by coordinators are similar in many respects to those identified by Workplace Education Practitioners at an NLS-sponsored forum in March 1999. Attended by 30 practitioners, including some from labour, the forum explored common needs and interests among practitioners and considered approaches to practitioner training. Similar too to the results of our questionnaire, the forum emphasized the value of a mix of formal and informal expertise-building, specific training, mentoring and hands-on experience. Networking, mentoring and information-sharing were seen as vital elements of professional development. See: National Literacy Secretariat, Human Resources Development Canada, "Workplace Education Practitioners' Forum Summary Report", Ottawa, November 1999.