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Tom Nesbit
Fraser University

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Educating Labour's Professionals

Tom Nesbit
Simon Fraser University

Abstract: This study examined the nature of education and training for full-time labour union officials in Canada. It was designed to complement similar studies in other countries and more general discussions of labour education.

Unions occupy a key position within the economies of most industrialized countries. Although the percentage of the workforce that is unionized is usually far less than 50%, union involvement with the implementation of technical and social change in industry has an acute effect on society generally and, more specifically, on the working conditions of the population. Crucial to these developments are the cadre of full-time officials who act as the union movement's key administrators and organizers. The most extensive studies of their work (Kelly & Heery, 1994; Watson, 1988) indicate that union officials have a wide range of responsibilities which falls mainly into three broad functions: servicing and representing union members, organizing and recruiting new members, and representing and promoting the policies of the union. Union officials are also expected to keep up with technological, economic and legislative changes. For example, recent developments in computer and office technology have necessitated changes in working practices that have tended to aggravate an already excessive workload for union officials. In addition, their work is often significantly affected by legislative changes and the transformations in industry and employment brought about by economic globalisation (Borgers, 1997; Brecher & Costello, 1998; Turner, 1991). Union officials can be seen as the labour movement's professionals, equivalent to professional workers in other spheres. Most definitions of professionalism refer to the exclusive possession of expert knowledge and preparation through formal education and training. Nevertheless, as Kelly and Heery contend in their study of British trade unions, "few unions develop a strategic approach to training, in which there is an attempt to specify the objectives of training policy, identify officers' training needs, and provide a system of release and cover for officers involved in training" (1994, p. 62). Consequently, this study was designed to see to what extent this might be true in other countries and it examined how Canadian union officials are trained for their work.

Literature Review

The forms and functions of labour education have been well-documented (e.g., Dwyer, 1977; Gray & Kornbluh, 1990; Rogin & Rachlin, 1968; Newman, 1993; Spencer, 1994). These studies variously discuss the general provision of labour education, its goals, and the various ideologies that support it. However, although crucial to an overall understanding of the role of education within the labour movement, such studies rarely examine, in any detail, the different types of education provided for those at different levels within union organisations. Specifically, they do not deal with the education and training provided for unions' full-time employees.

Indeed, studies of such training are generally hard to find. Although labour movements worldwide conduct extensive training for their members and officials and regularly monitor and evaluate their provision, few reports are published. In the English-speaking world, only Olssen's (1982) New Zealand study, the US studies of Allen (1962) and Kerrison and Levine (1960) and the British studies of Brown and Lawson (1972), Fisher and Holland (1990), and the Trades Union Congress (1972) focus, specifically, on the education and training of labour's professionals.

Each of these studies considers the educational background and prior formal education of those who become union officials. Unlike other professions, trade union work does not require much in the way of formal academic requirements. As Fisher and Holland (1990) identify, selection criteria value commitment to the union and a proven record of relevant industrial experience count far more than any formal or professional qualifications. However, the educational attainment of union officials is increasing. In 1972, Brown identified that only 20% of union officials had any formal post-secondary educational qualifications. This figure then progressively grew to 44% in 1982 (Olssen), 62% in 1990 (Fisher & Holland), and 75% in 1994 (Kelly & Heery). While this increase can be partly explained by an improvement in educational standards generally, it also indicates that unions are increasingly expecting their officials to possess formal educational credentials.

Rather than receiving preparation for their job through formal education, most union officials appear to acquire the necessary expertise and attributes through some form of "lay apprenticeship." Studies indicate that, prior to appointment, full-time union officials have already served several years as lay activists acquiring negotiating and public-speaking skills as well as a detailed knowledge of the union's constitution, rules, and administrative procedures, and the relevant industrial consultative and bargaining machinery. However, although some unions require prospective officials to pass an examination, there is "no generally-accepted corpus of theoretical or practical knowledge, no standard training for entrants, and no professional qualification for trade union work" (Kelly & Heery, p. 61).

In some countries (most notably Great Britain), unions expect their officials to supplement their expertise with more formal training. For example, a Trades Union Congress 1991 survey showed that almost two-fifths of Britain's unions had sent at least 25% of their officers on training courses in the past year and more than 50% in the previous five years. Much of this training was provided by the TUC itself who operated an extensive series of national and regional short courses (of between one and five days duration). In the USA, where the AFL/CIO has been less involved in the direct provision of education for its affiliates, union officials who require further training are more likely to be encouraged to attend labour studies programs arranged through a local college or university. The popularity of this approach can be seen from its extent: in 1990, there were over 50 post-secondary institutions in 30 states listing some form of labour studies program. One of the longest running examples of this type of program is the Harvard University's Trade Union Program which currently provides an intensive 10-week program that examines contemporary challenges facing labour, analyses the economic environment in which unions operate, and leads participants through the theory and practice of strategic planning (Bernard, 1991).

Research Design & Methods

The research design was based on that of a similar prior study (Fisher & Holland, 1990) and considered four inter-related questions: What initial and continuing education and training exists for Canadian full-time labour officials? What is the nature of such training? Who provides it? How is it evaluated? Data was collected by a postal survey of those Canadian unions with more than 10,000 members (almost 70 organisations) and semi-structured telephone or in-person interviews with 12 individual union officials selected on the basis of geographic and sectoral diversity of union and whether individuals worked in either a union's national or regional office. All interviews were tape-recorded and transcribed for later analysis. The complete data set was then coded and initial concepts and categories were linked into broader themes and patterns to develop increasingly complex concepts.

Findings

As in other countries, Canadian unions typically recruit their full-time officials from within. Local union officers or activists who have distinguished themselves at branch level or at conferences are more likely to be hired than those with little or no local experience. However, from time to time, unions also require the services of more specialist staff--such as economists or researchers or those with media, legal,

or computer expertise. Here, unions will be more likely to step outside of their own ranks and recruit from those who have been more professionally or academically educated.

Whatever their function, union officials enjoyed little formal education specifically designed to help them with their work. Although most unions in Canada provide a wealth of resources for shop steward and other lay official training, they were either reluctant or disinclined to offer much educational support towards those who had achieved permanent positions. Most officials are expected to be fully able to perform their jobs when they are hired and hence, require little initial training. If resources permit, new officials are sometimes "teamed" with a more experienced official--perhaps one retiring from similar work--for several days or weeks. However, this practice was not widespread, perhaps because many union official jobs are elected and, therefore, contested. It would certainly be naïve to expect a new official to be trained by someone whom she was replacing. Such teaming was more likely to occur for specific tasks--such as attending arbitration hearings--in which the new officer has little experience and can benefit from a more experienced colleague.

Many unions claimed to encourage new officials to attend local CLC-sponsored courses, labour studies programs offered at provincial colleges and universities and, occasionally, the four-week residential program of the Labour College of Canada. However, most of these programs are not specifically geared for the needs of full-time officials. In fact, several of the officials interviewed indicated that they had little time or inclination for attending such programs and that their education was best advanced by attending local and national conferences. Indeed, several expressed surprise that any education specifically designed for them would be viable. Those officials who had taken part in formal educational opportunities said that they were motivated more by an individual concern to better equip themselves than by any external pressure from

their union. Indeed, union officials who identified a need for further education were generally expected to incorporate it into their already heavy work schedules.

Most union specialist and support staff come with specific experience for their particular job and require little initial training. However, skills upgrading and other professional development is seen as necessary from time to time. Here, unions prefer to send the staff member on a specific training program offered by a local educational institution rather than develop their own in-house programs. These courses tended to be one- and two-day seminars on such topics as: how to manage difficult people, time management, computer skills, or facilitating meetings. Ironically, one of the longest courses mentioned was the week-long "train the trainers" courses designed by the CLC to help union officials run education sessions in their localities. Another successful course was one designed specifically to deal with arbitration. "The union realized just how much we were spending on lawyers," said one of its vice-presidents. "We thought we should be putting that money back into the union, so we trained some of our own staff to deal with cases and hearings."

In addition to courses for their officials, several unions were concerned to provide some basic education for their staff (particularly secretarial) who had little or no union background or experience. "They often have no idea about what a union is or what it does...so they don't always seem much help to members who contact us," said one national official. To counteract this, several unions allow their staff to participate in all or part of their regional "new representatives" courses. As one education officer explained: "We've found that an efficient way to introduce them to the union structure and the sorts of things we do. It also helps them grow accustomed to the union culture...and our values."

Finally, unions offered a wealth of suggestions about the types of courses they would like to see offered: language training, communication skills, or on current issues "such as globalization or the MAI [Multilateral Agreement on Investment]", courses for official's spouses and partners, dealing with unions as organisations, management skills--"how to manage different bits of the organization...dealing with people, dealing with decisions, dealing with technology, that sort of stuff", how to do research and write about it in a clear way, and using the internet as a research and advocacy tool.

Discussion

Several unions expressed grave concern about the lack of training provided for full-time officials. As one president put it:

You get elected to a full-time national position and suddenly you're a manager. And when people elect you the last thing they're thinking is whether you have good management skills. So, things like time management, organizing your own work or organizing other people's work or even how they change from working in an industrial setting to working in an office...they become major issues.

The same issues were also identified at a regional level. "When our folks leave the local and get elected to regional positions they have to learn a whole new set of skills--they have different responsibilities and different concerns and there are different issues," described one regional coordinator. "Really, we don't help them much...they have to figure it out for themselves. So, for the first year they flounder a bit...after that they get the hang of it...but it can sometimes cost us."

Despite these sentiments there appeared to be little concerted effort to develop a systematic program of training for labour's professionals. Clearly, unions have more pressing concerns. In uncertain economic times and climates of wavering public support, unions understandably prefer to focus their energies on protecting the gains they have made. Yet, most senior union officials have themselves participated in the vibrant tradition of labour education in Canada and recognise its crucial role in the building of the labour movement. What might explain this disparity?

There appear to be both personal and structural influences on the provision of education for union officials. One strong personal factor was the identification of an individual need when so much of one's effort goes towards supporting a collective organization. "I'd feel so guilty taking time off," was one official's comment. "I know I'd benefit from more training but the members' problems must come first." Related to this is the often individual nature of a union official's work. As one official explained, "Much of my time is spent developing working relationships, whether with the members or with employers. That's my responsibility...and I can't just leave that or hand off my problems to someone else if I want to go on a course."

An additional influence was the officials' often ambivalent attitudes towards education: "One crucial issue for us--and this relates to all aspects of our education--is the need to balance individual needs with those of the organization. People forget that union education is not just about raising individual awareness or increasing a person's knowledge; it's more seeing those goals in a more collective setting." Yet, attending union courses could be perceived as threatening or involving a loss of face. "Many of us maybe didn't do very well in school," said one national official. "So why would we put ourselves back in that situation if we think it's going to be like high-school?" "You're admitting you don't know something when you're supposed to know everything," said another official. "You've run for this tough job in the union and why would you think you could do it if you didn't know everything?" A final influence was the perception that courses geared towards the management of unions might be too inappropriate or too academic. "The last thing the union movement needs is an MBA," was a typical response. Academic attainment has never counted for much in a union setting. Indeed, too much "book knowledge" is often seen as detrimental and in direct contrast to the highly practical orientation required for union leadership.

Several structural or organizational factors also affect the provision of education for union officials. The first, naturally is a union's size. Briefly, small unions have far fewer resources in general and allocate much less towards labour education. "If you've got a region with only 12 officials and they're spread out across four provinces and two islands...freeing a couple of people up to go on a course is going to be quite difficult." The cost too can be prohibitive: "the amount of money we spend flying people around is enormous." Despite this, unions recognise the value of providing ample opportunities for officials to physically meet. "We've tried video-conferencing or cutting back on the number of meetings," said one official, "but nobody liked it."

They said, 'This is our only opportunity for us to meet and get some important work done so don't go screwing it up by only holding it once a year.'

A second factor involves a union's priorities. Often education has to take second place to a union's other functions such as organizing, servicing members, or negotiating contracts. Because these latter activities are generally the more visible aspects of a union's work (and hence, where members judge union effectiveness) they receive greater prominence. It is significant here that few unions allocate any specific resources or have policies on employee training or appear to operate any system of performance appraisal--a common way of identifying training needs in an organization. "That's one of the things I'd like to develop here," said one national education officer, "but it has to work its way to the top of my priorities. There's just so much we can do."

A third and powerful influence might be best described as relating to a union's organizational culture. Like other organisations, unions have their own cultures--sets of beliefs and values about people, society, and organizational objectives link together with traditions of how people relate to one another. As organisations born out of the continuing struggle for justice, dignity, and human rights, all unions hold democracy and tradition as core cultural attributes. However, beneath those overarching features, each union's culture is unique. Each has its own way of "doing things;" its own particular way of conveying its heritage through rituals, ceremonies, symbols, myths, stories, and physical artifacts.

In his powerful personal memoir, labour educator D'Arcy Martin (1995) speaks of the dynamics or "cross-currents" of union culture which can help identify the supports and barriers for education that exist within unions themselves and the movement generally. One key dynamic--what Martin names the "oppressive/affirmative"--is the presence in unions of inequalities and hierarchies of power. Women officials, for example, are often a significant presence at a local level yet are far less likely to hold a more senior or national post. One senior woman official described her first year as a national official, "It was dreadful...I was running around all over the country, never too sure of what I was doing or where I was going next. I never knew when I'd be home. I felt permanently exhausted. I know other women feel the same...there's got to be a better way of doing it than this." Other officials characterized the selection of officials for further education as itself political: "Sometimes, who the president chooses to send is quite contentious. If you're in favour, you get to go."

Another dynamic noted by Martin--"servicing/mobilizing"--is the ever present need for unions to provide immediate practical help and also create a climate for broader social transformation. This dynamic is often dichotomized into "business" versus "social" unionism--and unions do tend to prefer one approach over the other. However, Martin's point is that such a tension is present in every union activity. Busy officials, ever responsive to the demands of the membership, can always find reasons not to take time out for reflection or planning. Yet, these activities are precisely what many officials claim they'd like from more education. As one senior official who had traveled widely put it, "My experience having looked at a variety of unions in a variety of countries is that the ones that take a more proactive approach and use more strategic planning are the ones that can best deal with the problems of globalisation." For Olssen, these tensions regarding education are related to "a conflict between the traditional aims of unionism as a

reaction to unfair privilege and the need to adapt to a society where expertise and specialization are increasingly demanded" (p. 45).

Conclusion

In addition to increasing our understanding of labour education, this study adds to recent adult education literature on professional knowledge (Eraut, 1994; Schön, 1987) and the cultural connotations of learning at work (Leymann & Kornbluh, 1991; Marsick, 1987; Tuomisto, 1993). Further, it would extend the notion of labour education as symbolic capital (Bourdieu & Passeron, 1990) whereby power hierarchies are made visible and maintained and structural inequalities are legitimized. Of course, to unions, the measure of labour education--including that provided for officials--is how far it strengthens labour organization. There are many issues facing unions. Most are deeply concerned over how, structurally, they might face the enormous challenges brought about by economic globalisation and what they see as a concerted world-wide attack to weaken their influence and cut back workers' rights. One strategy lies in expanding their educational provision, and clearly, there is much room for developing further education for their officials.

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