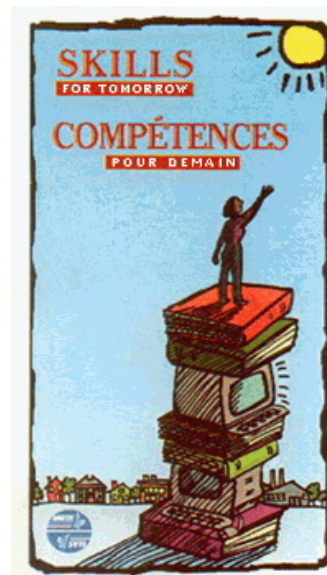




STRATEGIES FOR WORKER-CENTRED LEARNING

A Handbook for Unions
on Bringing Union “Visions” to “Actions”



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The opinions expressed in this paper are the author's alone

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About This Handbook

The trade union movement is an important and powerful sector in Canadian society, representing nearly 4 million workers in more than 275 unions. These unions vary in size and composition; some belong to international parents, while others are based exclusively in Canada. The vast majority of unions also belong to central bodies at the national (Canadian Labour Congress), provincial (federations of labour), and local (labour councils) level.

During the past two decades, unions and their central bodies became involved in workplace learning issues in an unprecedented way. A number of factors, including dramatic shifts in the nature and availability of work; changing demographics; and public policy initiatives aimed at involving outside “stakeholder” groups in labour market planning and programs, have drawn the attention and interest of unions. For many the availability of public funds coincided with a growing recognition that members needed to enhance their basic skills in literacy, numeracy, English and French as a second language and increasingly, introductory computer training. As a result, unions like the ones included in this handbook have planned and implemented strategies to increase the level and accessibility of learning opportunities for their members. They have devised innovative strategies ranging from program delivery (such as literacy classes at the workplace) to special “developmental” projects designed to promote awareness and understanding about workplace learning. Others have focused on integrating literacy into their existing programs, especially education programs. Still others have chosen to focus on building their internal capacity to deal more effectively with training issues with government, employers, educators, and especially within the labour movement itself.

Because of this diversity of experience, there are now many examples for unions and central bodies to draw from, in both planning “first” workplace learning projects or expanding current ones. In recognition of the growing expertise and interest of unions in workplace learning strategies, the CLC has supported information sharing and coordination, notably through the following two initiatives:

- The CLC Workplace Literacy Project provides unions with ways to share information about their experience and involvement with basic skill projects. Through an advisory committee, a quarterly newsletter and an excellent series of “how to” documents, unions and federations of labour are learning more about the importance and value of integrating basic skills principles and practices into their organizations. For groups that are newly involved, ongoing support with issues such as proposal development, information on “best practices” and networking with others is provided.
- Between June 1997 and June 2000, the Workplace Training Strategy focused on areas including basic skills, apprenticeship, labour adjustment, and skills training by providing national and regional coordination to unions and federations. This coordination included a national and ten regional training conferences, special projects and publications, and encouraging unions and federations to initiate their

own approaches and strategies to deal more effectively with workplace training issues.

The National Literacy Secretariat (NLS), Human Resources Development Canada, is another significant contributor to the support and resources that are available in the labour movement. All of the projects described in the handbook have received financial or other assistance from the NLS, and many more continue to do so. This handbook has been created by the NLS in order to:

- Emphasise the value and importance of integrating learning strategies into a union's core activities
- Share the growing body of information, knowledge and expertise about workplace learning between unions and central bodies
- Encourage new groups to be more systematic about planning organizationally before seeking NLS or other project funding
- Provide practical, relevant information and sample documents to unions about planning training such as funding proposals, formats and summaries of organizational needs assessments, policy statements on literacy and education, and program descriptions and evaluations.

The handbook is primarily intended to assist with larger scale organizational planning, such as planning that is carried out in national or regional union headquarters and federations of labour. However, much of the material and examples will also be highly relevant to large local unions or other groups that are attempting to initiate systemic change in this area.

Defining “workplace learning”

Before the 1997 CLC National Training Conference, the planning committee debated how to define “workplace training.” Eventually, the CLC defined the four types of training: basic skills (ESL, FSL, literacy/numeracy), labour adjustment for laid off workers, skills or job training, and apprenticeship.

Though basic skills are defined separately, it is an area that is woven through the other three types of types of training. Literacy and language upgrading programs are crucial to successful adjustment for many laid off workers, and in the area of skill training and apprenticeship upgrading is often required as a first step to learning job skills.

In this document, the focus of workplace learning – while it touches on other related areas – is on literacy. Though the planning techniques are useful in general terms, they are especially relevant to unions wishing to plan literacy programs, which have often proved to be a successful first foray into the broader spectrum of training. Similarly, the case studies focus on organizations programs that have focused on basic skills.

Section One: Plan to Plan

How do unions plan?

For many, the answer is “we don’t” at least not formally. Union leadership and staff face a myriad of problems on good days: organizing new members, negotiating collective agreements, settling disputes, and so on. On bad days, unions are on strike, losing members because of layoffs or technological change, or fighting hostile government policies. In this context the suggestion that a union take time to engage in “strategic planning” would not be very realistic. It is difficult to look forward when experience has proven another crisis is looming just ahead.

Yet, unions do plan, though they may not do so the way corporations do. Union leaders, staff, and activists learn by doing, representing members on a daily basis. In this way, they become skilful planners and administrators. Some common types of union planning include:

- Explaining and rationalizing new programs or services to the leadership of local, national and international executive boards
- Gathering input from locals or, in the case of central labour bodies from affiliates, to develop a political campaign, policy document, or convention statement
- Preparing to recommend a dues increase to add new services to the union
- Applying for funding from the provincial or federal governments. In order to receive funding, a union must explain its goals and objectives and clearly articulate how they will be achieving them, what resources will be required, and how results will be evaluated. By definition, a “program proposal” or “business plan” is an organizational plan.

The purpose of this handbook is to give some tips on how to do more strategic, focused planning to implement successful workplace learning strategies. It will also contain some examples of how other unions have done planning around workplace learning.

Overview of strategic planning

So, what is strategic planning? Unions by definition exist to struggle for social justice. Because of this, when it comes to planning it is probably more useful to look at a sector that more closely resembles the labour movement: the non-profit sector. Perhaps because unions and non-profit organizations share similar goals, they can draw important and relevant comparisons between them about planning. It is especially useful to look at the body of literature that has grown around strategic planning in non-profits. In such literature, non-profit organizations share a broad view of the purpose of strategic planning: helping organizations to do a better job. To do this, all the key players need to

agree on the priorities that are essential for the organization to meet its goals and objectives.

Some key concepts about strategic planning

- Planning is strategic when it involves choosing how best to respond to a changing and frequently hostile environment.
- Planning is systematic because it requires following a process in a focused way, looking at past mistakes, testing old assumptions, and gathering new information about the present. This guides organizations, including unions, in making sure they are always working toward our vision.
- Planning involves setting both long and short-term priorities. It must also articulate major goals and the methods the union will use to achieve them. The two must be congruent.
- The process is about building *commitment* by involving everyone who has a stake in the organization, including union members, staff, and leadership. A good planning process will allow for disagreements while also building solidarity and consensus.

Strategic planning is NOT...

- *A way to predict the future* or make decisions that will never have to be revisited or changed. Even though a plan can clearly articulate a strategy, it is still based on assumptions about the future that may not prove to be correct. This makes it important for a union to monitor change and test if assumptions remain valid over time. For example, many unions have set up language training programs and anti-racism programs because they recognized their former assumptions about the makeup of their membership were no longer current.
- *A substitute for leadership.* Leadership intuition, judgement, and reasoning skills are key factors in successful organizational change. Without them, no amount of planning will be completely successful.
- *A guarantee for a smooth, predictable, linear process.* Though our plan may flow smoothly on paper and in flow charts, reality is usually quite different. A plan must be creative as well as structured; cognizant that movement will be backward as well as forward. Sticking with a plan through normal ebb and flow is part of organizational leadership.

Factors affecting union readiness and ability to plan

- *Time:* Unions cite time as being one of the major factors having an impact on the ability to plan or even think in an organized manner about the future. Many unions make “plans to plan” and then have to cancel them because of a crisis. It is frustrating for anyone to have to juggle urgent priorities while

being expected to be “creative” in a planning session. A union needs to set aside sufficient time for planning, but still be realistic.

- *Experience of the leaders of the planning process:* If no one inside the organization has done planning before more time and preparation will be required. If the union plans to bring in outside resources, such as experts from other unions or central bodies, some thought would need to be given to how relevant their experience is to the particular organization they will be speaking to, and how much information is “too little” or “too much.”
- *Commitment to a shared vision of the union:* Most unions do not write down “mission statements” except in their constitutions; but this does not mean they lack deeply held values and assumptions about their purpose. Some unions articulate this formally in policy documents and other forums. However, much of it is reflected informally by the culture of the union: oral history (stories of older members from strikes, demonstrations or marches, other significant events); union education materials; songs and artwork from posters and magazines; union buttons and banners. Looking at these different elements will lead to some broad, shared principles to which everyone can agree.
- *The information that needs to be gathered:* How does the union know what the members’ needs are? How much information is available about the effectiveness of current programs and services? How much background knowledge and information does the union already have about similar programs or projects in other organizations?
- *Agreement on priorities:* Probably the toughest area to work through. Everyone will have a different perspective depending on his or her role in the union. Is there agreement on which services and programs are currently most important? Are there current power struggles over resources for programs and staff that will affect future projects?
- *Lack of trust:* It can be a serious impediment to effective planning. If one or more people in the group are afraid to share their ideas or their concerns, problems will likely surface later.
- *Inclusiveness:* The union must be aware of all the various levels of the organization that will be impacted by any change, and take steps to ensure that there is clear information and a process for gathering input. Committees do not need to have every single local union president or staff representative in the entire region or country, but time and energy must be spent to get input and support for the planning. Otherwise, people may feel threatened by impending changes and begin to sabotage the plan.
- *The size of the union:* The number of members, the sectors they work in, the structure of the local, regional, and national bodies and the number of staff will have a huge impact on the ability to plan.

Not all these factors can be accounted for when you are getting ready to begin planning. However, considering them before, during, and after the process will help you to be prepared and able to use your planning time constructively. Nothing is more annoying to busy people than showing up to meetings without a proper agenda, well

reasoned discussion points and suggestions, supporting documentation and an effective chair. Plan to plan.

Why plan worker-centred learning?

The previous section outlined some general principles about planning that can be utilized by organizations including unions to do planning. Now let us focus on how and why unions are planning and implementing worker-centred learning strategies.

Unions in Canada have had a long-standing interest in education issues, especially basic education (or literacy) issues. As early as the 1800's, a worker's ability to read and write was viewed as necessary to his or her participation in the workplace, the community and the union. The ability to read was further linked to understanding and challenging the social, political and economic realities affecting the lives of working people. Unions were among the first organizations in society to demand free public education as a way of creating greater equality among all citizens. For more information about these early efforts, read the handbook prepared by the Ontario Workers Arts and Heritage Centre titled: *"Thirst for Knowledge: The Canadian Labour Movement and Worker Literacy Education"*.

During the last two decades, there has been a resurgence of interest among unions in workplace learning issues. In its 1997 document, *"An Introduction to Union Training Issues,"* the Canadian Labour Congress described the growing extent of union involvement with workplace learning issues. In the document, workplace learning was distinguished from traditional labour education due to its significance to employment security and mobility on the job or between jobs. According to the CLC, the four main areas of "training" were described as:

- Basic skills, such as reading, writing, numeracy, and other entry-level skills
- Employment services for workers at risk of, or presently unemployed, such as career counselling, upgrading, and life skills
- Skills training for current or future jobs
- Apprenticeship.

Many factors have led unions to become involved in training since the early 1980's. The CLC discussed such issues in the document as:

- New technologies and work reorganization, combined with liberalized trade all over the world, leading to an unprecedented loss of well paying, unionized jobs in manufacturing, retail and service. Workers who lacked basic skills experienced great difficulty competing for new jobs that required greater reading, writing, numeracy, and increasingly computer skills.
- To respond to the negative effects of "free trade," the federal government initiated policies and programs to involve groups like business and labour in planning and in some cases delivering training programs. Innovations such as

union based literacy and adjustment programs; joint labour management sector training councils; and labour force development boards at the local, provincial and national levels, drew the attention of unions to training issues as never before. It also enabled many to receive funding to deliver their own programs at the workplace.

- A growing recognition that the composition of the Canadian workforce had shifted. Workers from equity seeking groups—women, people of colour, and aboriginal people—were entering the workforce in greater numbers, demanding greater recognition and inclusion within their union. This combined with large-scale immigration to urban areas like Toronto, Montreal, and Vancouver, required unions to think about their approaches to education and services. Along with anti-racism and anti-harassment programs, many unions became actively involved with English or French-as-a-second language programs – not only to improve members’ employment conditions, but also to encourage them to be more active in their union.

Set your goal

This is among the first questions a union or federation should ask itself before becoming involved in training programs. Many unions became involved in literacy work because they had a vague idea it was needed, and because government funding was available. Often, little or no planning was done beyond what was required in a funding proposal.

It is equally true, however, many of these same unions and federations can clearly articulate goals for training today. In fact, as they built their knowledge and experience, they became passionately vocal about a “union vision” for literacy.

Our goals have changed a lot since 1989 but we have always maintained that training through our Centres accomplishes two important things. First, training provides some kind of job security and second, it enables individuals to be better-educated citizens.

Tom Kukovica, UFCW

We want to be positioned on the leading edge of strategic planning and organizational needs assessment, all the other stuff unions need to do in order to develop programs ... we can transfer our experience [and] cut out a lot of the bumps for other organizations.

Linda Torney, MLEC

The BEST program certainly put basic skills and literacy onto labour’s agenda. It is still not there in a big way but it is certainly better than it was ten years ago. In a perfect world, you would have heavy duty buy in first, but sometimes that isn’t how things happen. I am sure that at one time no one took health and safety as seriously as we do today. But someday someone said, “We need to deal with health and safety training.”

Sandra Clifford, OFL

Additional comments leaders and staff have made about their goals for workplace learning include:

- It is a way of building skills and confidence in members, not only to improve their lives at work but also in the community, at home, and in their union.
- It is a way of protecting workers from job loss by equipping them with skills to move within their own company, or between companies.
- It is a way to redress gender and other inequities by qualifying women and visible minorities for better, higher paying jobs in their own workplace and in the labour market.
- It is a way to build support and solidarity for the union, and involve new activists. This is especially true of literacy and language programs that are a tangible benefit to workers who are otherwise uninvolved in the union. Workplace learning provides workers with skills to enhance all aspects of their lives and participate more readily in union activities.

The Ontario and Saskatchewan Federations of Labour surveyed participants to find similar kinds of goals had been met. The surveys overwhelmingly indicated the learners had improved job and personal skills, but had also experienced increased involvement with the union.

Before beginning to talk about training, it is important that key people inside the organization have a full and frank discussion about their goals. You can prepare for this discussion by:

- Review your past policy statements from conventions about education and training
- Review past policy statements from federation and CLC conventions about education and training
- Summarize the information you have about existing programs in your union through your own publications, staff input

You may be surprised to learn that your union already has a lot to say about this issue. As mentioned above, a great number of unions and federations became involved in the 1980s with government sponsored training boards, committees, and advisory groups. Often this activity has never been written down, but key staff and leaders who were involved at the time have a wealth of information and insights.

Before creating a formal planning process, consider some of the key factors other organizations believe to be necessary in order to achieve success. These factors can be found in the literature about planning in non-profit organizations:

- *Commitment and support from top leadership* from the beginning to the end of the process. Presidents do not necessarily need to sit on planning committees,

but key staff or other influential officers will need to, especially those with authority to make decisions

- *Clarity about who is to be involved* and how final decisions will be made
- *Commitment to providing access to information* that you need, or gathering new information; either through a formal organizational needs assessment or some other mechanism
- *Representation* from a good mixture of elected officers, staff from servicing as well as specialists departments, and activists; all will bring a particular perspective that should be considered
- *Openness to being inclusive* and encouraging input beyond a formal committee process
- *Adequate resources*, such as staff time, money for needs assessment
- *Willingness to question* assumptions and ask hard questions
- *No serious conflicts* between key committee members

You are probably thinking that based on this list, your union will never be ready. Remember we are talking about an ideal set of conditions. At different stages, the union's ability to have these conditions will shift and change. You can only do your best.

Be concerned if....

- The planning function is completely delegated to staff or an outside consultant without any involvement by leadership
- There are crises that prevent anyone from truly having time or energy for planning
- Leadership tend to make decisions based on intuition rather than planning and input
- There is organizational resistance to involving a broad range of people like those described above
- The leadership refuse to commit resources, or are being vague and non-specific about future resources
- There is an organizational climate that is nervous or threatened by change and has little creativity or strategic thinking in general
- The organization has been unsuccessful at past efforts to plan or introduce new programs
- External funding is the primary reason for involvement.

If the timing isn't right

Delaying planning is not giving up; it is postponing until there is a better environment to make bigger changes. In these cases consider:

- Waiting until a current crisis (such as a strike or other dispute with employers) has been resolved

- Try to do shorter term planning until more information is known
- If there is real opposition to planning or inclusiveness or unwillingness to change it is still sometimes possible to influence one key individual. However, if the resistance is widespread, the change may not ‘stick’ even if a top leader supports it. For change to occur, all levels of the organization must be open to it, including servicing staff and local union leadership. Try two parallel processes. Set short term, realistic goals. Instead of implementing a national or provincial training strategy, start small and build in conditions for a successful first venture with one or more responsive local unions. At the same time, ensure you do not lose sight of a longer term, more strategic focus.

Particular union risks

Success and risk factors to effective planning are common to diverse organizations. In the labour movement there are sometimes added risks that can impede planning for training:

- *Politics.* No one would dispute all organizations operate in some kind of political context. Like government leaders, union heads need to be sensitive to their electorate. Leaders supportive to workplace learning can be voted in or out of office any time. Policies that individuals can be personally committed to may not be popular among others.
- *Lack of clarity about the role of unions in training generally.* Workplace or on the job training has traditionally been seen as the responsibility of employers. Some unions fear becoming enmeshed in the employer’s goals and objectives for training, such as productivity gains or technological improvements that may lead to job loss.
- *How decisions are made.* The uncertainties that come with elected leadership often make it difficult to plan beyond the next election. Often there is too much or too little influence exerted by formal and informal leaders due to concerns about political survival.
- *Newly elected leaders* may have little working knowledge of training or education initiatives because they lack the necessary background or knowledge. This can result in unexpected changes to strategic plans or development of funding proposals.
- *Unclear or poorly define organizational roles* and lines of authority. Unions often struggle with how to manage their organizations precisely because their role has historically been to challenge “management” on the employer side. This sometimes leads to very unclear or ill-defined roles for leaders, staff and in the case of central bodies, affiliated unions. Without clearly defined organizational roles and lines of authority, there may be a lack of accountability and coordination between leaders and staff and between staff in different departments.

The strategic planning committee

No matter how formal or long term the planning process will be, a planning committee is an effective way to organize the time and resources of the union leadership and staff. It can also be a good indicator of the level of commitment during and after the planning process.

Being inclusive does not mean having fifty people on a committee. Rather, the individuals who are chosen should be representative of gender, roles (staff/elected officials), regions, and occupational groups inside the union. Some other benefits of inclusiveness are:

- Building enthusiasm and commitment to workplace learning—those who feel they have been involved in planning are more likely to feel some ownership of goals and objectives
- A range of opinion will ensure a broader viewpoint and more critical questions
- Future working relationships can be established
- Information will be more widely shared among staff and leaders

It would have been good to have a committee of affiliates that would have supported and promoted the program. There were people who were really pushing BEST but they were never part of any formal committee [that] increased awareness about the programs.

Sandra Clifford, OFL

Who not to overlook

Most people feel more comfortable and at ease with others who share our opinions and values. Though it may be tempting to set up a committee with staff and activists who are passionate about training issues, it is crucial that others be involved from the earliest stages, including:

- *Key leadership at the organizational level.* In a national union or federation, presidents or directors must be involved. If they delegate staff or other elected officers to be responsible it is important to ensure they are updated regularly on the committee's progress
- *Departmental staff/heads.* Heads of research, education, and other areas are key to successful implementation of programs down the road. If training is seen as an issue that is central to health and safety, human rights, union education and so on there is far greater potential that it will not be viewed as a "side issue."
- *Organizing, negotiating, and servicing staff.* These are the backbone of the union. They spend long, stressful hours building the union by serving the rank and file. Though their jobs are demanding, they need to be included in a meaningful way in the planning process. Their understanding of the

membership and the daily operation of the union will be critical in planning realistic programs down the line.

- *Sectoral and regional representation* from within the union. Long standing occupational sectors like auto, steel and mining are becoming blurred as unions face organizing workers in new types of work. To be relevant, training programs must recognize that needs may be diverse across sectors and regions.
- *Representation from smaller local unions*. In most cases, big locals have more influence over policy and strategic direction than the smaller ones. However it does not mean the voice of small locals are not important in the planning process. Smaller locals will be interested in the development of national or regional programs they may not currently have.
- *Coordination between union training initiatives*. In many unions, planning can be fragmented and confusing because a number of leaders, staff, and activists are involved in a range of training initiatives yet lack coordination between them. For example, union representatives may sit on a joint sectoral training initiative with employers and yet never be asked to participate in a union or government training committee. It is important that the union clearly define what they mean by “training,” take stock of how and who is already involved and active in the area, and ensure that there is some coordinated effort toward a broader training agenda. Many unions have appointed rank and file members to become literacy instructors; members of local or regional training boards, labour representatives on Employment Insurance appeal panels and governors of community colleges. These individuals have experience with training and can be of great benefit to the planning process.
- *Rank and file members*. It is important to find ways to get input from rank and file members. The planning process should seriously include ways and means of involving them. While it may not be realistic to appoint a single worker to sit on a national training committee, steps can be taken to ensure there are mechanisms for member input. Members who have taken language or literacy training through their union are a wonderful resource for inspiration and ideas. Local union education committees also have many long serving committed activists.

Other Resources

In addition to your core planning committee, you may want to consider including others as guests or even “visitors” who are invited to participate in certain topics.

- *Resource people from other union training programs*. The importance of sharing knowledge and experience cannot be overstated. In the interviews conducted for the handbook, people frequently praised other unions and federations who were able to provide advice and assistance to emerging training programs.

- *Government.* In some cases, a supportive and strategic funder can be an important resource to the committee, particularly if it plans to pursue ongoing funding from government.
- *Educators/trainers.* In 1998, the CLC Executive Council agreed to a policy that encouraged union representatives from the training and education sector and other unions to work together to promote and maintain public education delivery of education and training. By understanding the realities and opportunities inherent in union training and public education, new programs can be planned that will support the range of our goals and objectives.
- *Community based trainers.* Many talented and committed adult educators work in special training programs for disadvantaged groups in the community, such as visible minorities, women, aboriginal peoples, and the disabled. Such groups have a vast amount of knowledge and experience delivering training in hostile and difficult environments.

Section Two: Working Backward from the Vision

During the interviews with unionists for this handbook, the question was asked: “did you have a vision for your training program and what did you want to accomplish at the outset?”

Though none had been through a formal planning process or “visioning” exercise and even fewer had conducted an organizational needs assessment; each had had an idea that inspired them from the very beginning. Many had looked to established programs as a starting point, evolving into unique directions of their own.

On the face of it, organizations that are seeking to “assess needs” are acknowledging they lack information to properly plan. Suggesting that a planning group start with a vision seems contradictory: how can an organization have a vision for workplace learning when so much is unknown? Unions may have a staggering amount of questions. “How great is the need? Where do we start? What kind of programs should we deliver? How will we pay? Who will be responsible for implementing our plans?”

These are all valid questions, but in the “vision stage,” it is not necessary to address every single detail. That will come after the strategic planning group has generated a vision. To begin to articulate a vision, it is important to begin by looking at your current values and principles and the culture of the union.

The labour movement has many clear principles and core values that serve as an excellent basis for envisioning a new program or project. Our expertise and knowledge of adult education, gained through decades of labour education courses designed and delivered by the union, is another strength to draw on.

For example, labour education is grounded in the belief that all adults have the right to learn; that we learn as much from each other as we do from “teachers,” that we are teachers and students both. Union education is a way to improve a worker’s life in all aspects: at work, home, in the community, and in the union. Simply articulating these principles already begins to define the way we will deliver our basic skills or job-training program.

A vision is about “seeing ahead.” To be effective, it has to be coupled with clear strategies to “get where you are going.” Before getting into details about project planning (often a temptation when funding is made available), it may be very useful for a union to think more closely about their “vision” of training.

A Planning Committee may want to spend some time discussing their “vision” for the future training program. In the following exercise, there are a number of questions that are useful for beginning the discussion.

Worksheet: A Vision Statement	Dare to dream the possible. Describe a realistic but challenging vision for the training program
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External vision: Describe how the union would be improved, changed, or different if it is successful in achieving its goals for training?

E.g. our members would have greater access to training and education that would improve the quality of their lives.

Our members would gain recognition of prior learning, enabling them to receive credit from educational institutions.

We would reach out to members who are not currently involved or active in the union because of language or literacy barriers.

We would create programs that included the principles of adult education, including co-worker instructors and facilitators.

We would be responding to an important need among our membership for training for job security and mobility.

What is your programmatic vision for the training program today? (What would be our ideal programs and services? List in order of priority—top priority services at the top of the list.)	Describe the strategies you will use to achieve your vision. What resources will be needed?
1. <i>Negotiate training and education</i>	<i>Train staff representatives and negotiators to bargain training funds or other provisions to support training.</i> <i>Create materials for staff on purpose/importance of training funds.</i> <i>Research various models of union training.</i>
1. <i>Provide English and French as a second language at the workplace</i>	<i>Work with educator partners to design workplace learning programs.</i> <i>Train co-worker- instructors/trainers to facilitate classes or partner with community college or school board instructors through their unions.</i>
2. <i>Create PLAR program for all members</i>	<i>Design one day PLAR portfolio development course to be offered at weekend schools.</i>

Other places to look

There may also be policy statements or internal documents that will help you to outline a “vision” for training and education. By linking the vision to existing policies, the potential for buy in and commitment is much greater. Look in your own union first. Some places to start include:

- Policy statements on training and education from international, national and regional conventions and conferences
- Resolutions on training and education from conventions and conferences
- Special policy papers prepared for government committees and task forces
- Collective agreement language on training and education
- Articles in national and regional union publications about training and education
- Interview former staff or leaders who were involved in training initiatives either in the union, joint labour management projects, or government policy groups
- Minutes, statements and other documentation from education committees
- Research projects on training and education, work organization and technological change
- Education and Research Directors and staff
- Policy statements from other unions and federations

Section Three: Assessing Organizational Needs

An instructor or workplace learning coordinator conducts a 'learning needs assessment' in order to gather sufficient information to plan an appropriate program. The focus is on the individual, not the entire workplace or local union. An individual needs assessment provides crucial information that is necessary for planning an effective workplace program. No union instructor would begin a class without first asking a future learner, "How do you define your needs? What are your goals?"

In a newly published document called "*Bargaining Basic Skills: What Unions should know about Negotiating Worker-Centred Literacy Programs*" the Canadian Labour Congress describes three different types of assessment:

1. The individual needs assessment, as described above
2. The workplace assessment, usually done at a single workplace or with a single employer in order to plan a specific project
3. The organizational needs assessment, focused on the broader organization and the institutional factors that are necessary for successful change or innovation. It is this type of assessment that is being described in the handbook.

Individual and workplace assessments are important, and will almost certainly occur when the union decides to offer training programs to members. In large organizations, such as national unions or central labour bodies, "organizational needs assessment" (ONA) has a broader meaning and can lead to a variety of interesting outcomes.

Assessing training needs in organizations requires gathering a broad range of information from different sources. The members, as the future participants in programs, are incredibly important. However, so, too, are the leadership and staff who will have important insights into two areas:

- *Membership training needs.* Most staff representatives and local union leaders, from presidents to stewards, have an incredible amount of understanding and awareness of the daily needs of the members they represent. They help to resolve their problems at the workplace and listen to their complaints and are often acutely aware when members have difficulty reading or writing or speaking English or French. They can provide important information when members cannot easily speak for themselves.
- *Organizational factors for success.* At the local level staff and local leaders have a critical understanding of the factors that are necessary to successfully implement training programs. They will know if plant management is open or hostile to training; the level of interest among their own members for programs; and the conditions that will be needed in order for people to participate. Consultation with those who know the shop floor can prevent expensive mistakes in areas such as class scheduling, location, content. At the

regional or national level, staff and leaders also have much needed information about the organization's strengths and weaknesses. These individuals may be familiar with implementing other projects and be aware of some of the difficulties related to communication, resources.

It is vital that different groups in the union have an opportunity to add to the planning by giving input. The extent to which they are able to do so will depend on a number of factors, such as:

- *The time available to do the assessment.* Is this an urgent priority because of a crisis or response to a policy resolution between conventions?
- *The resources available.* The size and scope of the assessment will be partially determined by the amount of resources. Will staff be actively involved, or will an outside group be brought in? What levels of the organization will be examined? Who should be consulted, and what will it cost? Though it is better to plan an assessment based on what format will yield the necessary information, it is important to be realistic about the dollars and time that are available.
- *Size of the union.* Obviously it will require more effort if the union is large. It may not be necessary to “do more” but it will be important to think of ways to be representative.
- *Regional and local differences.* In national unions, there may be vastly different needs, attitudes, and interest depending on the region or the local union. What works in one part of the country may be out of the question in another. It is important to have a solid understanding of these differences before projects begin.
- *Structure of the union.* In highly centralized unions, it may be easier to implement a national program than in ones where there is a great deal of local union autonomy. In the latter case, if the national office is planning the assessment, special care should be taken to ensure genuine input and involvement in program design.

There are many other significant factors that it will be important to understand. A solid understanding of political, regional, and structural differences will ensure that inappropriate programs are not planned and ultimately doomed to fail.

Who should be included?

Leaders and staff at all levels need to be considered for their unique perspective. In most unions, consultation would include:

- *Key leadership* at the national level, such as presidents or directors; other officers such as vice-presidents and secretary-treasurers; executive assistants and department heads. In short, the group that makes strategic decisions on a day to day basis and whose buy in will be necessary for a program to fly

- *Regional leadership and staff.* Depending on the structure of the union, regional autonomy may factor even more significantly than that of local unions
- *Local union leadership and staff.* Again, the assessment will need to include those locals that are most influential while also making sure the voice of the smaller ones are included
- *Members who are representative* of the sectoral, occupational, linguistic, regional, gender, age, and racial composition of the union.

Ways to gather information

Individual Interviews – Key Leaders and Staff

An individual interview is a good tool for talking to key leaders and staff about their assessment of the organization. For national assessments, it is necessary to have a broad perspective. It would not be helpful to interview only local union representatives; therefore, a national ONA will frequently include:

- Interviews with national presidents or directors
- Executive assistants
- Regional or District directors or presidents
- Key staff such as heads of Research, Education, Organizing, Political Action, Human Rights, Women’s Issues, and Youth Issues.

Some considerations to keep in mind:

- *Scheduling:* Try to limit interviews only to those will bring a unique perspective to the process. While it may be tempting to include “everyone,” it will make the process much longer and may not yield pertinent information. Many project planners underestimate the length of time it takes to schedule and conduct interviews. Be aware that leaders are often out of the office for extended periods, and should have plenty of advance notice for an hour or longer interview. The interviewer will need to be flexible.
- *Prepare questions carefully:* Involve your Strategic Planning Committee in formulating the questions. The various perspectives of committee members will be important in gathering the necessary information. Ask only questions that are pertinent and will give you information you need. For example, you do not need to ask a National President about the history of the union; there should be plenty of documentation or staff sources for that kind of information. Try to get the perspective only a national leader would have, i.e. “Where do you think the union is headed with overall policy? Where would you rank the importance of education generally, and workplace learning specifically, in the union’s agenda?” Some interviews include questions about how the individual perceives the organization’s strengths and weaknesses such as, “What do we do well? Where can we improve? What is happening

outside the union that could create an opportunity for us to move forward? What is happening externally that might make our task more difficult?"

- *Be a good listener:* Listening carefully to what is being said, and following up on comments that are made can glean important information. It is not so much important to follow "the script" as it is to understand the perspective and analysis of the person being interviewed.
- *Don't ask leading questions:* Many interviewers have some idea about the outcomes that they would like to achieve; or they have conducted a number of other interviews and are eager to share information rather than gather it. The goal is to understand how much the person being interviewed knows; what his or her own ideas are; and how he or she envisions strategies.

Here are some key areas the CLC recommends be included as questions from "*Bargaining Basic Skills: What Unions Should Know about Negotiating Worker-Centred Literacy Programs:*"

- Were there major or minor changes in the last several years at the workplace (or sector or region)?
- How stable are the industries where you represent members? What changes do you foresee occurring in the next five to fifteen years?
- How has the nature of work changed in different industries/sectors?
- Do jobs require more or less education than in previous years?
- What is the average age and seniority of workers in different industries/sectors?
- What type of training is most needed, i.e. literacy and numeracy; computer skills; job specific skills; certification and licensing; apprenticeship; grade twelve equivalency; college or university degrees?
- Do any collective agreements include training or education articles? What do they say?

Sample Questions: Individual Interviews with Key Informants
(United Steelworkers of America – A National Literacy Project)

- Describe existing policies related to basic skills
- Describe existing programs related to basic skills
- Are there currently resources for policy and program development?
Policy and program delivery?
- What is the national/district currently doing to address literacy needs?
- Describe the gaps you see on the policy level? The program level?
- Do you think the union should facilitate further discussion on policies and programs?
- If so, at what level?
- What are some key areas you would like the union to focus on:
 - Policy development
 - Program development and delivery
 - Awareness building
 - Educational partnership
 - Lobbying government for improved educational policies and programs
- Do you have any thoughts at this time about the future role of the union in basic skills education?
 - Direct delivery of courses at the workplace/union hall
 - Partnering with education institutions to deliver
 - Advocacy and political action in the area of basic skills education

Membership and staff surveys

Once again, carefully plan the purpose of the survey; the information you hope to gain; and the length of time and effort it will take to get the results. In general, mail out surveys have poor rates of return because staff and members are too busy with their daily jobs to fill them out; or in some cases members may not be able to read or write sufficiently to answer the questions. There are other methods of surveying staff and members such as:

- Arrange to have staff complete a brief survey after a regularly scheduled meeting
- Attend local union, area council or district meetings and ask local leaders and activists to fill out the survey before leaving the meeting
- Arrange for instructors to complete a brief written or verbal survey about workplace learning during or after educational or other events
- Insert a survey in the union magazine. Members can mail in results or set up a toll free number to record their verbal responses
- Ask staff or activists to survey members in the workplace and record their responses for them
- Conduct a telephone survey of members using trained “co-worker” interviewers
- Some unions regularly use labour-based polling companies to assess their members’ needs and attitudes. Ask to include questions in an upcoming poll about workplace learning.

Do not be too ambitious; unless it is a formal research project, you need to be representative (of gender, culture, region, occupation, and so on) but you do not need thousands of responses. Try to keep written surveys very brief, and use multiple choice or rank priorities. If there are resources available to do so, consider designing the questions to be collated later on a database. It will make it easier and quicker to analyze and manage the information once it is gathered. There are many non-traditional ways to conduct surveys. Be creative, and remember, do not ask questions unless you plan to use the results.

Focus groups

This is a popular and interesting way to gather information from local staff, local union activists, and rank and file members. Unfortunately it is also time consuming and often expensive, especially in national projects. If the union plans to carry out focus groups, ensure that:

- Groups are scheduled in all the regions of the union. Depending on the structure of the organization, district or regional considerations should be factored in.

- Ask staff and district or regional leaders to help you organize the focus groups. Explain the purpose of the group, and be specific about the type of people you want to be there.
- Have a plan for paying the costs of focus groups. Be clear if the locals or districts/regions are expected to pay for members or staff to attend. If there is project funding or if headquarters will pay, explain how payment is to be made, i.e. reimbursing locals, or paying direct expenses claims by members.

Once your groups have been scheduled, prepare your questions. Remember in a focus group the facilitator or focus group leader asks the questions and everyone in the group has a chance to respond. Because you will not be gathering individual responses, you will need to have a way to record the group's information. Some ways to record results are:

- Tape the information and go back to it when you have finished the focus group. This is a good method if the group leader is on her own; she can maintain eye contact and listen carefully without having to worry about writing down responses. However, it can be time consuming to transcribe the sessions.
- Have a co-facilitator write the responses in long hand or on a lap top computer. If you can find someone with good keyboarding skills, the latter method makes the write up that much quicker and easier.

Focus groups should be no larger than ten or twelve participants. Make sure they are held in comfortable surroundings and provide refreshments if possible. Remember that members may be coming before or after work or meetings, so try to be brief and to the point without “rushing” through the process.

Remember to create an atmosphere that is inclusive and comfortable. Maintain eye contact with whoever is speaking and encourage quieter members to contribute. If one or two individuals are dominating the discussion, ask to hear from others who have not yet spoken. Be tactful, but firm about getting input from the entire group. One way to do this is to address each person individually after saying; “could each of you tell me a bit about how your job has changed during the last several years, and whether or not new technology or other factors have made it important to learn new skills?” This is a good icebreaker (everyone seems to have something to say about how their job has changed) and invites quieter group members to speak. Remember that most people like to talk about themselves, but some more than others need an invitation!

Sample focus group questions

1. Are there basic education needs such as reading, writing, math, English or French as second language training needs in the local/unit?
2. What kind of reading, writing, math, and problem solving is needed for the job you do today?
3. Have these skill requirements changed in the last three to five years?
4. Do you foresee these skill requirements changing again in the next several years?
5. Has the introduction of new technologies or methods of work organization or quality improvements increased skill requirements in the members?
6. Does the company currently provide skill training? If so, please describe it.
7. Do you feel the training and the skill upgrading needs of the membership are being adequately met at this time?
8. What improvements would you like the union to make to training and skill upgrading programs? (Examples: basic skills at workplace or union hall; preparation for grade twelve diploma; job skills; reimbursement for courses taken off the job; career counselling; introductory computer courses such as word processing, internet training, data base and spread sheets, computers for local union administration and at home.)
9. Looking at the above list, prioritize the top three areas where you wish to see improvements made.
10. Do you have any other comments you would like to make about your expectations of the union in this area? Is there anything we have not touched on that you would like to add?

Section Four: Case Studies

In the area of workplace learning, diverse projects have resulted from a traditional organizational needs assessments or other planning processes:

- Establishment of direct delivery of training in basic or other job-related skills, either through the union (co-worker instructors) or in combination with educators from community colleges or school boards. These include programs like Basic Education for Skills Training (Ontario Federation of Labour), Metro Labour Education Centre (Toronto and York Region Labour Council), Worker Education for Skills Training (Saskatchewan Federation of Labour), and the Worker Education Centre (Hamilton and District Labour Council). Basic skills programs are integrated into the mainstream of the central body or the union, through either collective bargaining or some other mechanism and are offered on a continuous basis as a membership benefit.
- Promotional/awareness building projects are often carried out by central labour bodies or by union national headquarters. In these cases, the central body or headquarters do not coordinate actual delivery of training programs. Instead, the focus is to build organizational awareness and commitment through a promotional campaign and/or communications strategy about the importance of workplace learning. Usually this will lead to further interest and activity on the part of affiliates regional or local union bodies. The United Food and Commercial Workers (UFCW) and the Union of Needletrades Industrial and Textile Employees (UNITE) began long-term approaches to workplace learning in this way. Promotional/awareness building campaigns are often a first step before beginning a developmental or “capacity building” project.
- Developmental or “capacity building” projects permit central labour bodies or union national headquarters to active measures to develop a workplace learning approach in their organization. This normally involves supporting affiliates, local or regional union bodies to more effectively approach such issues as:
 - Analyzing and responding to employers, government or other institutional groups training policies and programs
 - Assessing the effectiveness of internal union programs and practices, such as learning policies and programs, clarity and accessibility of union materials
 - Participating in joint labour management training programs
 - “Knowing how to” develop union-only training approaches, including articulating goals and principles; defining mandate and vision; planning specific activities; and instituting collective bargaining or other types of strategies to finance ongoing programs
 - Building up internal expertise and knowledge about workplace learning at the leadership, staff, activist and rank and file levels

- Producing information materials and courses about workplace learning, or integrating information into existing courses

National union headquarters, such as UNITE and UFCW, have focused their role on capacity building with their regional or local union bodies. The Manitoba Federation of Labour, the Canadian Labour Congress, and the Nova Scotia Federation of Labour have all initiated some form of developmental or capacity building approach to support their national and provincial affiliates.

While these six case studies are important, they are certainly not an exhaustive list of workplace learning programs undertaken by Canadian unions. Literally every national and provincial central body has sponsored NLS projects or other initiatives related to training. All of these projects are also extremely worthy of further scrutiny. However, in order to include a reasonable number of studies, some considerations were useful, such as describing and analyzing programs that were well established and therefore reflect the range of organizational issues and success factors over an extended period of time; comparing and contrasting programs with similar mandates to determine factors for success; and relevance to national and provincial organizations.

The United Food and Commercial Workers International Union

About the union:

The UFCW is an international union representing more than 200,000 women and men in Canada. Though the largest sectors are food manufacturing/processing and food retail/wholesale, there are hundreds of other occupations with members from Newfoundland to British Columbia. It was formed in 1979 after a large number of smaller unions merged.

The UFCW Canadian Director is Michael J. Fraser, who replaced Tom Kukovica in October 1999. Kukovica was interviewed for the handbook because his administration did much of the planning and implementing of training programs.

The UFCW has a National Training Program, two national joint labour/management training councils in food processing and retail food, and eight Local Union Training Centres across Canada. They offer a range of courses from basic skills (literacy/numeracy, English as a second language, computer training, career counselling, labour adjustment), as well as job skills.

Key points:

- The union must bargain training trust funds if it is to implement long term, ongoing training programs. “Patience, persistence and commitment” are needed.
- Though local unions have different approaches to delivering programs, national coordination is necessary to ensure members will have job mobility inside and between sectors.

Case study

The United Food and Commercial Workers Union is one of the largest private sector unions in Canada, representing over 190,000 members in retail food, food processing and manufacturing and other diverse sectors such as social, health and personal care services. The UFCW was created in 1979 after a series of mergers of former food retail, packinghouse, soft drink and brewery and other unions.

The first Canadian Director, Clifford Evans, inspired much of the training and education activity in the years to come.

The union first became involved in training issues in the late nineteen- seventies when Local 1977 was organized to represent workers at the Zehrs supermarket chain in Southwestern Ontario. The independently owned family chain has since been purchased by National Grocers, but remains a highly successful and well known regional supermarket chain in the area.

As Canadian Director Tom Kukovica explains it, the UFCW training strategy began over fifteen years ago when the Zehrs chain refused to promote women workers “who were trapped in job ghettos” to higher skilled, better paying jobs. Kukovica says: “we saw it was a vicious circle and decided the only way we could change it was to create opportunities that would allow our members to access better jobs. So we negotiated one cent per hour for a member training and education fund.”

“The fund was locally based, but we thought the model would work across Canada so we called a meeting of all the chief executive officers and told them what we wanted them to do. The union was then bargaining with major retail food chains across Canada and we ‘told them training was one of our priorities.’”

“Over time other locals adopted the proposed model and negotiated local training funds. Initially, it was difficult to rationalize the purpose of the fund to employers – particularly in periods of downsizing and layoffs – but as time went on local unions were able to negotiate more funding.”

The process of creating a “national training program” took place between this first initiative with Local 1977 and Zehrs that created the Clifford Evans Training Centre and the present day. As Kukovica explains, in 1990 both adjustment (career counselling and other employment services) for displaced members and literacy became priorities. Funding was sought from the federal government resulting in the union’s “Layoff and Closure Program” and “National Literacy Project.”

The initial literacy project was funded by the NLS, and focused on building awareness of the importance of the issue within the UFCW. A second project to help local unions establish pilot projects followed in 1994. The third project, now nearing completion, is helping local union training Centres to integrate literacy into their operations.

In addition, in 1990, the union began to develop “sectoral” training approaches in food manufacturing and retail food/wholesaling. Once again, the federal government provided financial and program support to the union and business. Through this support, two major human resources studies were completed in both sectors, and national training councils were created.

Despite the government support, Kukovica insists that the union must be committed to training financially as well as philosophically. “I do not think you are committed otherwise,” he comments. “If you sustain programs on grants only then you are relying on the good will of government and that can change suddenly.”

The training trust funds that are negotiated by local unions pay the costs associated with the training centre, the staff and instructors who operate it, and in many cases the wages and benefits of the members who attend classes during working hours.

However important the national office viewed training, Kukovica is quick to point out that “there were many difficulties along the way. Training may have been high on the national union agenda but not necessarily among the locals. Everyone had [their own] priorities.”

Kukovica created the national training program or NTP in 1993. “We wanted to make sure there was some coordination nationally. If the local unions each had their own programs we could not [ensure] job mobility [between locations and sectors] for our members.” To give substance to this policy, the union recognized it needed added organizational expertise. “We had no real experience even though we had started Clifford Evans Training Centre. We were looking at a much broader perspective and different models. We also needed someone who could put a proposal to government together and had a basic understanding of programs...there was no one in the office that could do that in 1989.” In 1993, Kukovica appointed two Directors for Training (Programs and Policies and Finance and Administration). These positions, along with money to assist locals to purchase or build a first training centre, were paid for from the National Training Fund created in 1991 when locals agreed to remit one cent of local training trusts to UFCW Headquarters.

Kukovica acknowledges much of the planning for training was “staff driven.” However, he also maintains that as much as the union needs capable staff to carry out programs, the role of the leader is critical. “A leader has to have a general vision, and use whatever opportunity he has to convey that vision and hopefully people will share it. My vision was that training and education is a very good vehicle for the union to keep the membership, to provide better service to the membership. When members come to a training centre they see the union is not just about paying for staff salaries and cars, or arbitrations and grievances.

UFCW is among a handful of unions in Canada who support both job training and union training through collective bargaining. (Other notable examples are the Canadian Autoworkers and many building trades unions such as the International Brotherhood of Carpenters and Joiners, the International Order of Operating Engineers, the Labourers International Union of North America and the Sheet Metal Workers Union.) According to Kukovica, this is the real key to successful implementation of training. “If you want to have a real program that is going to continue then first you must get the leadership and then the employers into true collective bargaining so it can be permanently sustained. The employer cannot cut it off unless he goes through a bargaining process. If the government gives you a sum of money, who is going to pay for it afterward? I would say, if you are serious, the only way is through bargaining. When grants come, they may help you to put more emphasis on a program or expand the program, but [it should not be] the core of a program. You must have one cent, five cents, or ten cents [per hour worked per member] coming in.”

Kukovica advises unions that setting up training programs of any kind is a long-term process. “It’s slow. And it all depends on how committed the local union

leadership is and what kind of structure the union has. In a centralized union, it may take a hell of a long time because you cannot impose your will on the locals. You have to work with them.”

The National Office seems to have achieved its objective of working with local unions. Along with the Clifford Evans Training Centre there are now centres in British Columbia, Alberta, Saskatchewan, Manitoba, Ontario and Halifax with another expected to open soon in Quebec, a total of nine centres in just over ten years. During Kukovica’s final convention in July 1999, those local presidents who have started training centres described a staggering array of programs and training courses in diverse areas. Many have made basic skills training, such as literacy, English as a second language, and computer training their focus. Several others have emphasized labour adjustment for members who lose their jobs. According to Kukovica these locals would “probably strike an employer who tried to cut [training funds]. These funds are as important as their pension plan and other benefits.”

Kukovica’s final word of advice: “It takes time to build that kind of commitment...it is also takes being patient and persistent.”

Sample Article – United Food and Commercial Workers Union

TRAINING AND EDUCATION TRUST FUND

Effective _____ 20_____, the Company agrees to contribute _____cents (_____ ¢) per hour to the United Food and Commercial Workers Union Local Training and Education Trust Fund for all hours paid and worked by all full-time and part-time employees, to a maximum of dollars and cents (\$_____) per week per employee.

Hours paid and worked as defined and set out in Article ___ of this Collective Agreement. The Company shall forward the contributions every four (4) weeks to the Union and shall include a list of employees, the number of hours paid and worked by each employee during each four (4) week period.

Toronto and York Region Labour Council

About the labour council:

The Toronto and York Region Labour Council is larger than many provincial federations of labour, representing more than 180,000 women and men in the densely populated City of Toronto – the manufacturing heartland of Canada. In response to its ethnic, cultural, and linguistic diverse membership, the Labour Council began developing innovative education and training programs in the 1970's. The Metro Labour Education Centre was formed in 1987 as the culmination of a number of other programs. Funded by government, MLEC offers a wide range of programs and services in areas such as literacy and language training, labour adjustment, equity projects, and a labour studies certificate program. It has a formal partnership with George Brown College in Toronto.

Key points:

- Establish clear lines of authority between staff, leaders and board members in projects
- Recruit staff carefully, ensuring that skills and ability are paired with a commitment to union principles
- Take steps to ensure a project is integrated into the parent union or central body. Leadership and commitment are needed for the project's long-term viability.
- Draw on the experience of others, and do not be afraid to “dream.”

Case study:

Toronto and York Region Labour Council is the largest labour council in Canada. Because it represents workers in the densely populated ‘megacity’ of Toronto and nearby York Region, its membership is higher than that of most federations of labour. As a result the Labour Council has had to develop unique approaches to education and training in an attempt to meet the needs of a diverse – largely immigrant – population.

During the nineteen-seventies, the Labour Council was among the first central bodies to offer union education. Previously larger unions had offered their own courses in areas such as stewards training, grievance handling, and local union administration. The smaller unions that did not have their own programs were eager to take courses through the Labour Council. Eventually a partnership with Humber College of Applied Arts and Technology resulted in a certificate in labour studies. “The concept grew out of a recognition there needed to be [union education programs because] at that time there were really very few places where union activists could go for hands-on training,” says Linda Torney, President of the Labour Council.

Other projects followed. “In 1982 we added English as a second language at the workplace because we recognized [with] all the immigration to Toronto a lot of people in workplaces spoke English as a second language.”

As the Labour Council’s experience and skills broadened, there was also a desire to assist the unemployed. Many labour councils, including Toronto, had already experimented with Unemployed Help Centres during the nineteen-seventies but most of those had closed due to a lack of funding. “Then we started hitting another wave of unemployment so the President at that time [Wally Majesty] got the idea of going to Employment and Immigration Canada [now known as Human Resources Development Canada] for some funding for labour adjustment, and to expand other programs as well.

By 1986 relations with Humber College had worsened over long-standing debates about “course content and the type of programming we were doing in Labour Studies. It was getting harder and harder to work out an agreement with the College.” When funding was secured from EIC to set up a labour adjustment and skills training project, the Labour Council decided to form a new partnership with George Brown College of Applied Arts and Technology. The two organizations are still partners today.

The Metro Labour Education and Skills Training Centre opened its doors in 1987. Along with the existing Labour Studies certificate program and English at the Workplace (EWP), a skills training program for unemployed workers was created. Two years later, the province of Ontario funded an adult literacy program in the workplace.

At its height, the Metro Labour Education Centre (renamed in 1990) offered a wide array of programs including:

- Hundreds of EWP and Adult Basic Education (ABE) courses in workplaces all over Toronto. MLEC was one of the first to introduce basic computer training as an ABE course. Part-time instructors taught courses with backgrounds in adult education or trade union activism that were trained and supported by MLEC.
- A range of services to assist local unions with all aspects of workplace layoffs and closures, including career counselling, job search and training information, advocacy and support. An important innovation was introduced in 1992 when MLEC began offering training to union representatives on joint labour/management adjustment committees, and supporting union peer helpers to coordinate “Action Centres” that were set up to help co-workers become retrained or re-employed.
- Important research projects dealing with issues facing workers, such as unemployment, racism and sexism and technological change.
- Equity projects aimed at increasing the involvement of workers of colour, women, and immigrants in their unions.

Before losing provincial funding in 1999, MLEC employed over forty project representatives and seventy part time instructors. Today due to on-going funding cuts the number is reduced to twenty. The recurring funding “crises” has made their job difficult and demoralizing for them.

Linda Torney and Trish Stovel were interviewed together for the document. Torney has been president of the Labour Council since 1988, but was involved in the creation of MLEC before that as an executive board member. Stovel was hired as Executive Director in 1990.

When asked about how planning for MLEC occurred, Torney has only vague recollections. “I know there were pages and pages of documents but I don’t believe there was a great deal of process. The President of the Labour Council probably made phone calls to various folks in the movement saying, ‘do you think this is a good idea?’ I can’t conceive of anything starting without that happening. But there was certainly no formal meeting or planning session or think tank or focus group or anything that we might be inclined to do today. I remember we...debated it [at the Labour Council executive board] and we thought it was a good idea. That was probably the extent of the planning that went into the early development. I mean *nobody* was doing planning about *anything* in those days. Back then strategic planning was not a word that you heard tossed around.

Like others in the handbook, Torney credits much of the early “visioning” to one important individual. In this case, President Wally Majesky seems to have had the commitment and drive to pursue funding and expand programming. Having already gained experience with funding through other projects, Wally “went exploring...and out of that came the concept for MLEC.” Significantly, it was the first time the labour council was named as the direct project coordinator. Previously Humber College had controlled the funding.

Asked for her vision at the time, Torney says: “To me the vision of an education centre was almost visual. In my head, I suppose I thought of a storefront, some place that could be immediately identified as labour. I thought less about the programs we would offer [than] raising the visibility of the labour movement among the general population in Toronto. The value of that inspired me as much if not more than the actual training we would be able to offer. It was all part of an idea to validate the labour movement in the community.”

There was no specific organizational needs assessment conducted before opening the centre. Torney acknowledges, “Given the stage we were at, I don’t think it would have worked for us. I think there would have been a lack of interest among the affiliates that may have killed the idea right then! They probably would not have perceived a need until we started to go out and market the programs. Then people said, ‘Oh yes, this is great, and it’s also neat that its free!’ We blindly went forward with a dream and somehow it happened.”

In fact, Stovel says much of MLEC's early success was a result of the willingness to take on projects without a great deal of experience and planning. "I think what finally occurred to me was how responsive and creative the centre was. In those early days, we just did what had to be done! Things could change so rapidly but the staff had so much creativity and ability and energy—whatever the need, they went out and invented something or figured something out. We became innovators." Another factor was the rapid changes in the workplace. Workers were being laid off in unprecedented numbers, and technological change was occurring at such a rapid pace "a worker [who did not] speak English or lacked numeracy could no longer function." The introduction of the occupational health and safety act obliged employers to post written information about hazards. "How can you be aware of hazards when you cannot read?" asks Torney.

Over time, both Torney and Stovel acknowledge there has been a great deal of "learning by doing" and that today they view planning as crucial. "Its important especially to plan in new projects. This is where your strategic planning...let's call it visioning... comes in. If you have hired staff [for the project] they have to be part of a process where you sit down and ask yourselves, 'what is it we want to build here? What do we want to create?' Then you lay out the steps to get there. At some point you are going to identify [strategies] so you can go on to more clearly define how you are going to go about doing [things]. It's not that much different than...planning a conference. You ask yourself: 'what do we need for this conference to work? What is the goal of the conference? What will the workshops look like? Who are we reaching out to? What are we going to charge?'"

Because of its organizational expertise, many groups including unions in this handbook cite MLEC as giving them early inspiration. WEST and BEST drew on the examples from the workplace literacy classes. UFCW designed much of its approach in their adjustment program based on MLEC's approach to assisting laid off workers. Because of this, Torney says they have a great deal to offer groups who want to plan learning projects. She highlighted some of the areas where MLEC has developed expertise:

- *Clear lines of authority between staff, leaders, and board members.* "More organizational problems occur because these issues are not taken into account from the beginning." Torney recommends that organizations need to be managed by one person. "It should not be a board member. There has to be a separation between the board policy makers and the manager who is running the day-to-day operation. If the board members are hands on the project is going to fail. The manager has to be responsible to the board. Everybody [admires] cooperatives but in reality there are always tensions in a co-op and I haven't yet seen one that works." A relationship of trust between the manager or executive director, and the leadership, is essential. Leaders and the executive director must not undermine one another by going directly to staff about management issues.

- *Careful recruitment of staff.* Like many unions in this handbook MLEC has found that staffing decision have a tremendous impact on the success of the project. Torney advises that unions “spend time talking this through and making sure they are all clear about what they want to achieve.” This is particularly important in the case of the Executive Director, who may be mandated to hire the rest of the staff. The job posting, advertisement and interview have to be carefully planned and “fair,” especially since it is to be expected that workers in a labour project will themselves be unionized. Skills and abilities are important but to Torney, it is also crucial they be combined with “a union philosophy.”
- *Integrate the project into the union or central body.* Torney says the Labour Council has never viewed MLEC as a separate entity, even though its funds are almost all from government. The MLEC Board of Directors is made up of Labour Council Executive Board members. The Labour Council is highly visible at MLEC events and has been actively involved in numerous funding crises. “The executive board members cannot say enough good about us. They are the real champions. When we have a serious funding crisis there is real panic among the affiliates because they literally cannot envision the labour council without MLEC.” In contrast to the experiences of others that felt their unions would not support projects that lost government funding, Torney is adamant: “We never perceived that we were going to go down. It is not in our mentality. We are an organization that is identifiable in the labour community – we are practically an institution. We have a unique approach to education. To be completely honest, in my own heart and mind I think MLEC is just as important as the four community colleges in Toronto.”
- *Organizational commitment and leadership.* “You need sustained commitment and a lot of perseverance. It is critical for leadership to be involved. During a crisis, staff is aware there are emergency board meetings taking place and that I am going to meetings. They know that we are calling on the affiliates to help us and that they have the active energy of the leadership on the board and beyond.”
- *Draw on the experience of others.* “Hook up with some group that has already ‘been there, done that’ and get yourself some guidance and advice as you proceed. I think that’s the first thing to do.” MLEC is eager to provide assistance to other unions interested in workplace learning.
- *Dream.* “Shape your dream. Spend some time defining what you want to do but for heaven’s sake, be creative. Be visionary! Be exciting! Challenge yourself to come up with what you really want to do and then go out and figure out how close you can get to it. Do not look at the funding application guidelines to plan your program. You can use a funding application to shape your program, to manipulate your program, but not to create your program.”

The Ontario Federation of Labour

About the federation:

The OFL is the largest provincial federation of labour, representing over 650,000 women and men from more than 1,500 affiliated unions. Because of sizes and importance, the OFL has three full time officers and a staff group assigned to research, education, human rights, health and safety and political action.

The OFL created the Basic Education for Skills Training Project in 1987 after a major policy paper on “life long learning”. An administrator and training coordinator, and eight regional coordinators coordinated the BEST project across the province. BEST was the first labour literacy program to use “peer” or “co-worker instructors. Once trained, these instructors returned to their workplace to teach co-workers. At its height, there were more than 90 classes over 50 workplaces across Ontario. Over the life of the project, more than 841 co-worker-instructors were trained who in turn delivered classes to approximately 7950 rank and file union members.

The BEST project, which lost the bulk of its funding in 1997, is credited by numerous labour organizations in and outside Ontario, both for its successful programs as well as the support and assistance it was able to provide to emerging programs.

Key points:

- Define organizational structure with very transparent lines of authority
- Recognize that programs with a regional structure are impacted by unique factors, such as geographical vastness and staff isolation
- Ensure the project is integrated into the parent organization by making sure project staff are included in key events and activities
- Provide a start up or “developmental” period before agreeing to training outcomes that are not realistic
- Gain the support and backing of the affiliates in a formal way to increase awareness about the project and gain support for its continued existence.

Case study:

The Ontario Federation of Labour is the largest central labour body in Canada, representing over 650,000 members from 1,500 affiliated local unions. Standing committees are responsible for setting policy in areas such as health and safety, human rights, and education. Policy conventions are held every two years at which time union members determine OFL policy. There are a full time President, Secretary-Treasurer, and one Executive Vice-President. There is also a project and administrative staff group assigned to areas such as Education, Research, Political Action, Human Rights. Special projects are also created to address particular concerns.

The Basic Education for Skills Training Project or BEST was such a project. Sandra Clifford joined the federation in 1987 as a BEST regional coordinator. She has observed the project from its beginning, and has many insights to offer to other organizations planning to initiate workplace learning programs.

Like other OFL policy, basic skills or workplace literacy was first addressed in an OFL Convention policy paper (included here). According to Clifford, the policy paper was based on several key factors.

The first was the recognition that “basic skills was part of life long learning”. The second was “the OFL discovered that there was [provincial government] money” available to employers who wanted to set up programs. The employers were not accessing the funding so, “we said, ‘Fine, give it to us and we’ll do it.’” The fact that the Labour Councils of Metro Toronto and Hamilton had both received funding was a further incentive. Finally, Clifford says: “We saw a gap. There were programs in Metro Toronto and Hamilton but nothing else in the rest of the province.”

Clifford acknowledges that the OFL drew on the Toronto and Hamilton projects for ideas. However there were also important differences. Once the initial funding was secured in 1987, Education Director Jim Turk hired two key staff: an administrator and a training coordinator. The three were instrumental in designing the actual model for literacy programs.

Like the Toronto Labour Council, the OFL did not conduct a formal organizational needs assessment before creating BEST. It was necessary to articulate goals and objectives for the funding proposal, but “a lot was taken from the Toronto Labour Council model.” A notable difference was the “idea of using peer instructors.”

MLEC and the Workers Education Centre at the Hamilton and District Labour Council had both decided to hire part time instructors who would teach workplace classes. In contrast, the OFL recruited “peer instructors” who would be trained by BEST and then return to their workplaces to teach co-workers. While in the early years these instructors had a role in negotiating classes, this task fell increasingly to the full time coordinators who had discovered it was more effective to establish a commitment from the employer before training an instructor. This ensured that all the instructors who were trained who have teaching opportunities back at the workplace.

The peer instructors had a great deal of support from full time staff. In addition to the Administrator and Training Coordinator based at OFL headquarters, there were eight Regional Coordinators based across the province. The Coordinators participated in annual training sessions for peer instructors and afterward provided ongoing guidance during the rest of the year.

When asked how the OFL made decisions about the project Clifford says that BEST staff made many early decisions. There was not a formal planning session

involving the OFL Executive Board or the OFL Education Committee. “The project [always] reported to the Education committee but I think it was more reporting than planning.”

OFL Officers did play a key role. The OFL Education Director reported to an OFL Executive VP, and was accountable for the daily operations of BEST. “The officer attended all our staff meetings and was fairly hands on,” says Clifford.

Leadership commitment was an important factor. “You need buy in from all the officers; if not, there should be at least one person who is responsible and who believes the project is worthwhile.” Clifford commented this is important because, “it is a long road and there are a lot of bumps along the way. It is important the staff see their work is important enough for an officer to take interest.”

There were difficulties defining organizational lines of authority. Clifford recommends: “There has to be someone who has final say...it isn’t practical for a department head or director to be hands on.” But she adds, if project staff are to be responsible they must have real authority.

Another difficulty related to the demand by government funding agencies for an unrealistic number of “training contact hours” with students. “I know we [felt we had to agree] to guarantee access to continued funding but in fact what it meant was that our first set of instructors were immediately expected to produce. There was no lead-in period.”

The need for a developmental phase also needs to be recognized. “There was just no breathing room. We needed a year or two to do developmental work rather than ‘producing’ training hours. If you are not realistic about outcomes in the beginning, each year ... you have to agree to produce more. BEST was always playing catch up from the very first year, striving for things we could not realistically produce.”

Another difficulty concerned the apparent lack of integration of BEST into broader OFL policy and operations. BEST Regional Coordinators were located across the province in regional offices and had few opportunities to interact with permanent staff at OFL headquarters in Toronto. “It was hard having Regional Coordinators all over the place ... [with no] co-workers to interact with. There was a lot of isolation.”

At headquarters, the administrator and training coordinator who were hired for their expertise in the area of literacy found it difficult to become part of a well-established staff group. “I guess,” says Clifford, “the BEST staff did not interact a lot with the permanent OFL staff because they were outside the labour movement and tended not to interact as closely with people here as they might otherwise have.” Structurally, the OFL viewed BEST as a separate project that was not expected to survive past its government funding. These factors often left the staff feeling “excluded.” “We had very low morale from the beginning. You felt as though you were always fighting to convince

people the project was important. That was pretty stressful and demoralizing.” BEST staff later began to insist on being included in key events such as OFL conventions. “It probably changed because we complained,” says Clifford.

Like other organizations, the OFL struggled with how to recruit and manage staff. When hiring regional coordinators the OFL decided that union background was critical. “That idea was sound,” says Clifford, because unionists had the experience and confidence to deal with labour and management. However, “there was a need for them to learn about basic skills. For most everyone that was fine, but it was also clear from the beginning there were [some staff members] who did not ‘get it’ and were not suitable for the job. But unfortunately nothing was done and that became another stress for the group.”

The combined effect of the above factors created many difficulties for staff who often felt demoralized and threatened with job loss.

When asked for her recommendations to other unions, Clifford makes the following remarks:

- Define *clear organizational structure* with very transparent lines of authority. While the commitment and interest of officers and other permanent staff is critical, a project manager needs to have real authority to run the project.
- *Recognize that programs with a regional structure are impacted by many factors.* For example, regions that are remote have greater difficulty meeting targets for student training hours than large urban Centres. Locating staff in different regions can lead to a lack of communication and integration with the parent organization.
- *Ensure that projects are integrated* into the broader operations of the organization, and be careful to include staff in key events and activities.
- *Provide a “developmental” or start up period* for the project and try to avoid committing to unrealistic outcomes or goals – with government funders and affiliates.
- *Gain the formal support and backing of the affiliates.* “It would have been good to have a committee of affiliates that would have supported and promoted the program. There were people who were really pushing BEST but they were never part of any formal committee. [A committee] would have increased awareness about the program.”

Clifford also comments that though it was not conducted at the outset of the BEST project, other labour organizations should consider formal planning. The vision is also important. “Right from the very beginning the idea was that the program should reflect labour values and be controlled by labour. We wanted all the principles of good adult education [to be incorporated] into the peer instructor training so it could be implemented by them back at the workplace.”

In 1994, the Province of Ontario withdrew funding from the BEST program (along with the Worker Education Centre in Hamilton and MLEC in Toronto). Though the OFL retained some BEST staff at headquarters, the regional coordinators were laid off due to lack of funds.

However, the legacy of BEST is considerable. The project has been praised widely in the labour movement, and many unions and central bodies claim it as their initial inspiration for their own programs. Clifford, now OFL Education Director, says: “I can look at it now and say for all the stresses and strains during the last ten years the BEST program put basic skills and literacy onto labour’s agenda. It is still not there in a big way but it is certainly better than it was ten years ago. It is an educational process within the [labour] movement. So I guess in a perfect world you would have heavy duty buy in at first, but sometimes that is just not how things happen. I am sure at one time, no one took health and safety as seriously as we do today. But somebody still said, ‘we need to do health and safety training’.

Excerpt from Policy Paper on Education, prepared for the 1986 OFL Convention and leading to the creation of the Basic Education for Skills Training Program in 1987:

Literacy

Existing information suggests that many Canadians are functionally illiterate. Illiteracy is a trap, which prevents people from using the resources available to them to the fullest extent possible. Opportunities for life-long learning, promotion, and the development of new skills are all cut-off for the functionally illiterate. Even the vast volume of union publications and notices are inaccessible, making full participation in the life of the union difficult.

If we reflect back to the comments made earlier about the streaming processes used in our school system, we can readily identify part of the source of the problem. Some large number of people is simply abandoned by the school system. They are never given a full opportunity to participate in the life of our society.

In the past, governments have treated illiteracy as a problem that affected immigrant workers and certain disadvantaged social groups. There is now a growing recognition of the problem among employed members of our society, many of them trade unionists.

All over Ontario groups of people are working to provide literacy training. These people work hard under grossly under-financed conditions because they are strongly committed to improving the lives of people. All of us in the trade union movement know people in our own organizations who have struggled with the enormous disadvantage of being unable to fully use printed materials. It is not difficult to imagine the enormous good we could accomplish for such people through a well-designed program which delivers this service at or near the workplace, where possible during paid working time.

We should seek to launch a literacy drive that operates in the workplace, during working hours. This drive should take on the character of a major campaign and must follow the fundamental principles of adult education – democratic control by the participants over methods, approaches, and the materials to be used. This program would focus its attention on the needs of people currently in the workforce who are victims of the failure of our school system.

A Program of action for the OFL

- The OFL will convene an educational issues conference early in 1987. Heads of unions and other persons interested in the process of lifelong learning will be invited to attend in order to refine a plan of action. A significant portion of the program at this conference will be devoted to the streaming issue in our school system and to a potential literacy campaign.

- During 1987, the OFL will convene a seminar for labour representatives on educational and other boards in order to provide them with the tools needed to enhance their effectiveness.
- The OFL, in co-operation with affiliated unions will initiate the process of electing and training education delegates and technology stewards in as many local unions as possible.
- The OFL Education Department will proceed with the development of instructional materials for education delegates and for education committees in Labour Councils.
- As part of the process of establishing a highly activist education policy the OFL Executive Board will establish a committee to investigate the feasibility of establishing a permanent OFL Education Centre.
- If the building of a Centre is seen as feasible the OFL will proceed with due speed.

The Saskatchewan Federation of Labour

About the federation:

The SFL represents more than eighty thousand women and men from over four hundred local unions. While it is a smaller federation, it is notable for its level of activity and innovative programs such as WEST and Kid's Camp. President Barb Byers is well recognized in the labour movement as a champion for worker literacy.

The Worker Education for Skills Training Project was formed in 1989 as a response to interest generated by a provincial "needs assessment". Though WEST was given support and guidance by the OFL's BEST Program, it has developed its own unique approach to workplace literacy.

Key points:

- A needs assessment is important because it more clearly defines the extent and type of literacy needs among members
- Clearly define staff roles – failure to do so can have negative impacts on program results and eventually funding
- Leaders should draw on the help of other labour organizations that have been involved with projects, and learn from project staff who have a great deal of experience and analysis about the issue
- Try to address the issue of ongoing funding at an early stage so the program will not be jeopardized or shut down if government dollars are eliminated.

Case study:

The Saskatchewan Federation of Labour represents over four hundred locals from forty-two national and international affiliated unions. Barb Byers, President of the SFL, and Ron Torgerson, who coordinates the Workers Education for Skills Training Program (WEST) shared their experiences for the handbook.

The Federation first became interested in workplace learning in 1989. Byers learned that there were funds available to unions to deal with literacy issues. She also knew that the Ontario Federation of Labour had started its pioneering BEST program. Still, Byers admits she knew very little about the issue and even less about the actual needs of the membership. "I think I had a lot of the same misconceptions a lot of people did: that literacy was an issue for sixty-year old men who didn't finish school because they had to get a job ... or an issue for aboriginal people. I mean, I had contact as a social worker with kids who had basic skills issues, but I would never presume to translate that into workplace issues."

To her surprise and delight, the SFL Executive Board was eager to discuss the issue. She remembers hearing board members say that literacy skills were not only

important to deal with workplace issues like health and safety but also to access union education. “For instance, how could you get someone to be a steward if they couldn’t fill out a grievance form? From then on I knew we had to pursue the thing.”

At the same time, an SFL affiliate called the Grain Services Union had identified literacy needs among their membership. Rather than working alone, the GSU offered to work with the federation to start a pilot project. “In a way they were offering to be our guinea pig,” says Byers. “So it was very positive in that sense, we had the opportunity.”

Things moved quickly afterward. Recognizing it needed to more specifically define literacy needs, the SFL applied for funding to conduct an investigation through meeting and interviews with senior staff, local executives and members from affiliated unions. When the funding was obtained, the SFL hired a project coordinator who Byers describes as “very keen from both a practical and philosophical level. She was very committed.” Byers credits this first coordinator, and later Ron Torgerson, for providing her with much of her information and understanding about basic skills issues. “I have had the advantage that the staff and other people in the movement have mentored me and helped me understand where we should be headed.”

The findings from the needs assessment were startling. According to their own document, the SFL found “overwhelming demand and support for a program designed to upgrade workers basic literacy skills.” Byers agrees, saying: “I had an idea... but I didn’t see it across the board. I learned I was wrong.” She describes one group of workers who were interviewed in a grain mill near Swift Current. Among the eighteen who were interviewed, eleven identified that they had literacy needs. “I was thinking we would get a couple but when that many came forward....”

They were also surprised at the range of workers who wanted to be involved. “We had to tell management people the program was only for union members!” laughs Byers. “I guess at first I expected a stereotypical response that fifty-five year olds who had worked in the grain elevators since age sixteen and were still there. But we had interest from all ages.... One of our most enthusiastic groups was a construction crew. They trained team teachers and persuaded the wheat pool to donate a trailer that could be hauled around for classes...it was joyous.”

Besides her staff, Byers credited other labour organizations for helping the SFL in the early days. After completing the needs assessment the decision was made to create a project resembling BEST in Ontario. “It was the closest thing we had seen to union adjustment. Of course it needed some adjustments for Saskatchewan.” In contrast to Ontario, Saskatchewan workers were more concentrated in the service sector or resource extraction, many in small and geographically remote areas. The goal of the first pilot project was to see how transferable the BEST model would be in Saskatchewan.

The pilot project involving six workplaces was a resounding success. The peer instructors were given fourteen days of intensive training before returning to their workplaces to teach.

The WEST program has not been without difficulties. Like most government-funded programs, it experienced lapses in funding and staff layoffs. Byers regrets that some funding may have been lost because confusion over staff roles and organizational structure may have had a negative impact on the results.

“We had a couple of struggles that I can think of in regard to staff. For example, when we had two coordinators we could not resolve whether or not their jobs should be identical or whether we should re-define the roles so that one was organizing [new classes] and the other was providing on-going services. As we were struggling with how we were going to resolve it, we lost our funding.”

The lost funding led to the elimination of one staff position, indirectly resolving the issue. But Byers reflects: “I knew that if we did not get more shops, especially [the larger] crown corporations we were going to lose that funding. I take responsibility for not saying to staff, ‘we have to make a decision and since we cannot come to a consensus I am making the decision’. But by not deciding I ended up deciding and I have always felt that it had an effect on our [keeping] that funding.”

Though the federation carried out a formal needs assessment, Byers admits that Ron is primarily responsible for planning. Because the SFL is a relatively small organization with few staff, Byers was actively involved in the early stages, even writing the first funding proposal herself. However, the program is well established today, and WEST’s relationship to the President and the Executive Board is primarily a reporting one. “Frankly,” comments Byers, “if someone had said ‘I want to be much more involved’ I would have said ‘great’. We have a more informal process. We don’t have as many bodies to spread around so there tends to be the same people.” In the absence of having a board actively involved in planning, Byers admits much of the day-to-day work falls to Ron.

Though the program is successful, Byers worries about the ongoing funding issue. While she feels the federation affiliates support the program, she does not foresee a time when they will be willing to pay for it. Some larger unions have even been setting up their own programs, which were formerly taught through WEST. “I have to be honest. The [government] money was the enabler. I would love to say that our people were really committed but I have always worried that if the government pulled the pin, where would we be? And that is still a real fear. That is a problem unions have not so different from the corporations we deal with; there can be commitment at the senior levels, people who philosophically and practically committed and some activists who are committed, but overall no one is prepared to put any money into it. I am not sure our activists are there [in terms of paying for WEST]. We have had struggles promoting it when the money has been there, just to get it on the agenda.”

Byers remains an outspoken and well-known advocate for literacy in Saskatchewan and the rest of the labour movement. She is philosophical about the length of time she and others like her have dedicated to the issue, recognizing that change does

not occur quickly in most organizations. Rather than focusing on literacy as a separate issue or policy, she “tries to work the issue in when I am talking to affiliates without making it sound as though I have come to the ‘literacy’ part of my speech. Instead I’ll say, ‘Gee, did you ever think maybe part of the difficulty with involving people is because they cannot relate to the union publication or the union process when they cannot read or write?’”

The United Steelworkers of America in Canada

About the union:

The USWA is an international union representing more than 200,000 men and women in Canada. Formerly known mostly for its significance in organizing workers in the steel industry, today the USWA represents a growing number of workers in health care, security, office and technical professions, and retail.

The USWA has achieved notable success with joint labour/management training ventures in the steel and mining industry. The Canadian Steel Trades and Employment Congress has trained more than 28,000 employed steelworkers by offering a certificate in steel-making through community colleges across Canada. The labour adjustment program has helped hundreds of thousands of steelworkers and other groups to become re-employed.

Case study:

The USWA National Office is currently conducting a literacy needs assessment to determine how to meet the basic skill needs of workers not currently covered by other training initiatives like CSTEAC. They also want to build internal capacity to deal more effectively issues related to literacy, English and French as a Second Language, computer training, and career counselling.

The United Steelworkers of America in Canada calls itself “everybody’s union” because its over 200,000 members work in “every jobs imaginable”. Though the origins of the union are in mass steel production, today the union represents workers in health care, security services, office and technical employees and retail.

The union has also been highly successful in several training initiatives, most notably its two sectoral human resource councils. The massive dislocation of steelworkers in the early nineteen-eighties led the union and the companies to form the Canadian Steel Trades and Employment Congress. This joint program initially focused on worker adjustment to respond to the need of many laid off workers. Innovative and comprehensive services were created and still exist today. In 1992, CSTEAC conducted a human resources study to determine if there were new and emerging training needs in the sector. They learned that many employed steelworkers wanted to upgrade their skills in order to have more career mobility and opportunity. As a result, the Skills Training Program was created. Today, more than 28,000 steelworkers have participated in a certified training program that includes job and basic skills. Twenty community colleges across Canada have partnered with CSTEAC to deliver the programs in the workplace, union hall, or the college campus.

Building on the success of CSTECH, the USWA and participating companies formed Mining Industrial Training and Education Council (MITEC). This initiative will offer similar training to miners across Canada.

The USWA have developed excellent policy regarding literacy and workplace learning over the years. In the policy documents and resolutions, they have articulated clear principles and goals for training. The union has built on past policy and their sectoral initiatives to begin to formulate an approach to workplace literacy.

Though CSTECH and MITEC are important training programs, many USWA members do not come within their jurisdiction. In areas such as secondary manufacturing, retail, financial and human services, and security, there are no comparable programs. Yet, the union recognized there were many literacy and basic skill needs among the broader membership due to a number of factors:

During the period when BEST operated in Ontario, the USWA recruited more than fifty members to become peer instructors. These instructors became an important source of information to the union about literacy needs among the membership.

Urban centres such as Vancouver, Toronto, and Montreal had an incredibly diverse ethnic and racial membership. The union was concerned about involving these members, especially those who spoke English as a second language.

The mass layoffs that occurred at the beginning of the nineteen-nineties revealed a great number of older workers who could not access retraining because they lacked basic skills. In Toronto, MLEC assisted the local with a needs assessment before the closure of the Inglis appliance factory. During the assessment, it was discovered over thirty different languages were spoken in a plant of less than eight hundred!

To better understand the needs outside of the traditional sectors, the USWA National Office applied for funding from the National Literacy Secretariat to conduct an organizational needs assessment. A steering committee was formed to oversee the project, and a coordinator was appointed. Though an independent consultant will assist with the work, the coordinator is actively involved in interviews, focus groups, and the writing of the report.

The goals of the assessment are to:

- Build support in the union for a long term, ongoing commitment to training and education, literacy and English and French as a Second Language
- To develop the internal capacity of the USWA to plan and implement a successful long-term approach to all areas of training including literacy, ESL/FSL, workplace training, apprenticeship and employability skills
- Establish effective literacy and ESL/FSL policies and programs in a timely way.

There are four key strategies to meet the goals listed above:

- Complete an organizational survey of current literacy and ESL/FSL policies and programs (otherwise known as basic skills)
- To assess the effectiveness of current programs and policies in all sectors
- To produce an inventory of existing programs, a summary of responses to their effectiveness, and to identify gaps
- To produce a detailed report containing recommendations to be presented to the USWA leadership at the national and regional level

The method of obtaining the necessary information includes interviews with key informants, including high level leadership at the national and regional level; and focus groups with rank and file members and local union activists across Canada.

Guidelines for training – United Steel Workers of America

Our Union has adopted the following guidelines for training of all workers. These guidelines will direct the Union as it works with employers and governments, and local unions as they deal with individual employers.

1. The content of all workplace training programs provided to union members must be jointly developed and approved by the union and the company. Employee representatives on workplace training committees must be selected and appointed by the union
2. Training must be an integral part of every job, and must not be done on the employees' own time
3. Training should be developmental and continually deepen the employees' knowledge
4. Training should emphasize generic skills that are portable and not limited to specific jobs
5. Opportunities for training must be offered to all workers on a fair and equitable basis. We must identify and overcome barriers to training for women and other groups traditionally disadvantaged in the labour market
6. In workplaces where it is apparent that there is a lack of basic literacy and numeracy skills, we must ensure that individual workers are treated positively, and will not have to risk repercussions from the employer or co-workers for indicating that they require such training
7. The identification of training needs must not be undertaken according to narrowly defined performance factors as determined solely by employers, consultants, or government agencies. Individual and organizational needs assessments must be jointly developed
8. In most cases, our own members make the best teachers. Instructors should be trained from within the union
9. Where training programs are to be provided away from the work place, they should be delivered through public educational institutions rather than by profit-oriented private sector trainers

* Training is important for what it achieves, it is not a goal in itself. Training for the sake of training is meaningless. Training is important because it enables workers to get good jobs. A good training system, no matter how well run or how well funded cannot create jobs.

* Training by itself is not enough. Good training programs will be linked to changes in the workplace that place workers in new roles and relationships, and which allow workers to actually use what they have learned. Good training will empower workers.

Co-determination on training

Just as managing is too important to leave to managers, training is too important to be left to business or to government. Our union must advance our members' training interests, and be involved in training decisions at all levels: at the workplace; at the sectoral level; and at the provincial and federal levels.

* At the workplace, there must be a renewed emphasis on training in collective bargaining, and as part of work reorganization initiatives. Workplace training decisions must become the joint responsibility of the union and the employer.

* The Union must work hard to create sectoral training initiatives. In this area the Union will strive to build on the successes we have had working with employers in the Canadian Steel Trade and Employment Congress.

USWA national literacy project

In September 1999, the USWA National Office received a grant from the Human Resources Development Canada to investigate the union's current ability to meet the literacy needs of its current and future membership. Of particular interest to HRDC and the Union is our ability to meet these needs for members who do not have access to other training and education opportunities through sector training partnerships such as CSTECH and MITEC. The result of this investigation will be to produce a report that details the current gaps in literacy policies and programs, and both short- and long-term recommendations to address those gaps.

Long-term goals

- To build support in the union for a long-term, ongoing commitment to training and education, including literacy
- To develop the internal capacity of the USWA to plan and implement a successful long-term approach to all areas of training and education including literacy, workplace training, apprenticeship and employability skills
- To establish effective training and education policies and programs in a timely way.

Project objectives

- To complete an organizational survey of current literacy policies and programs (known hereafter as "basic skills programs")
- To assess the effectiveness of current basic skills policies and programs in all sectors, emphasizing those not involved in other joint labour management initiatives
- To identify gaps in the basic skills current policies and programs

- To produce an inventory of existing basic skills programs, a summary of responses to their effectiveness and to clearly identify where gaps need to be addressed
- To produce a detailed report containing recommendations to be presented for discussion to USWA leadership at the national and regional level

Methodology

Under the supervision of a National Steering Committee, the Coordinator will work with staff, elected representatives, members, and an independent educational consultant to:

- Summarize existing basic skills policies and programs in USWA policy documents, convention and conference papers, references in national, regional, and local union press releases, bulletins and publications, training and educational clauses in collective agreements, and other secondary sources
- Conduct individual interviews with key informants at the national and regional level to summarize their perceptions about the unions current ability to address basic skill needs and summarize recommendations for future action
- Hold focus group discussions in each district with local union leaders and rank and file members to assess their level of awareness and interest in this issue, and summarize their perceptions and recommendations about future action to be taken by the union
- Produce a report that includes an inventory of current policies and programs; an analysis of the gaps that need to be addressed; and short and long term recommendations to meet those gaps

The Union of Needletrades, Industrial and Textile Employees

About the union:

UNITE was formed in July 1995 at a merger convention of the former Amalgamated Clothing and Textile Workers Union (ACTEW) and the International Ladies Garment Workers Union (ILGWU).

The National office of the union first became interested in basic skills in response to demands by members at convention for skills upgrading. Phase One (1995-1998) included a detailed needs assessment and recommendations to the union. Phase Two, now underway, offers a series of promotional and educational tools to help local unions approach literacy needs more effectively.

Key points:

- When using an outside consultant or consulting group, ensure the union remains actively involved and “hands on”
- Explain the need for dedicated project staff to leadership, and recruit carefully
- If project staff are newcomers, provide sufficient time for them to understand and feel comfortable in the union. This is crucial to building trust and gaining the cooperation of local union leaders and staff.

Case study:

UNITE was formed in July 1995 at a merger convention of the former Amalgamated Clothing and Textile Workers Union (ACTEW) and the International Ladies Garment Workers Union (ILGWU). Though the merger has been difficult, steps are currently being taken to resolve outstanding issues that will allow the two groups to work more effectively together.

The union first became interested in the issue of basic skills in 1995. According to Education Director Janice Gairey, “the membership wanted to be upgraded and so it went to the Canadian Conference as a resolution. That is when the first phase was implemented. The Canadian Director John Alleruso hired ABC Canada, a literacy organization, to do the research and development.” ABC had worked previously with the union on a joint labour/management training initiative.

The purpose of the Phase One project was to “identify the education and training needs of our members so we can develop and build on our skills. Opportunities for education will help our members be full participants in their work, their union, their families, their communities and their future.”

Under the supervision of an Advisory Committee, the overall research strategy included:

- Focus groups and interviews with diverse leaders and members reflecting the different industries, regions and cultures of the members
- A summary of existing research
- A clear language review of selected union materials
- Interviews with selected management.

Focus groups took place in Vancouver, Winnipeg, Ontario, and Quebec. In all, the research involved approximately 250 UNITE members in total who were asked a series of questions about their needs and concerns with:

- Basic skills in the workplace
- Changes at the workplace
- Communication at the workplace
- Involvement with the union

The results that were yielded were the basis for an important second phase. However, Janice tells a cautionary tale about some of the difficulties – and pitfalls – that can occur during and after organizational needs assessment.

According to Janice, working with an outside consulting group posed some problems. She felt at times that they were not as forthcoming about information as she would have liked. As well, she viewed their relationship with the union as too “hands off” and felt there should have been more direct control by the union over the research.

The merger had only recently occurred and this compounded the organizational complexity of the ONA. However, UNITE members were encouraged by staff to press for action on literacy needs. Resolutions were formulated and debated at convention. There was concern about job loss in the apparel sector and “members needed portable skills to move to other workplaces. There was a general consensus that if members were able to acquire skills they would be able to find new jobs.”

The ONA validated many of the assumptions that staff and local union activists had already identified. Key findings included:

- English and French as a second language were immediate needs, and viewed by the members as an integral part of acquiring further skills
- Basic computers skills were needed for the workplace and at home
- Many wanted to finish high school
- Communication skills for team work were needed
- Basic skills for elected representatives were important to successfully carrying out union work.

However valid the research findings, Janice said she had to encourage the union to follow up with a second phase. Only newly hired as Education Director at the national

office, she explained “I could not do [the entire project] and be expected to do a good job. I also told them if they planned to ask for a reasonable amount of government funding that we had to have a good plan. Otherwise, why would we even bother? There is no value if you are not going to be doing something creative and something worthwhile at the end of the day.” Based on her reasoning, she was given permission to hire a project coordinator.

“Our first step was to hire a project coordinator and have him or her look at what had been accomplished in the first phase and to start figuring a way of promoting the issue inside the union.” It had already been decided that “interns” would be appointed inside the union to promote basic skills. The first task of the coordinator was to be visiting local unions and recruiting interns.

Janice felt that though the outcomes were clearly specified to the newly hired coordinator, she had difficulty integrating into the union. “I have to say it was my fault,” explains Janice, “because I assumed the person would fall into the role. Being creative was the most important aspect of the job. I [only] wanted to give general direction.” In hindsight Janice says she would have taken account of the difficulty a newcomer has in an organization, and allowed the coordinator more time to understand the environment.

Janice was emphatic about the importance of gaining the trust and acceptance of others in the organization for a project to be successful, especially for newcomers. The managers, staff, and local union leadership had to feel “they could trust you” before co-operating.

Though the ONA provided a great deal of information, Janice also looked to other labour organizations to provide her with guidance. She visited central labour bodies like the OFL and talked to unions that had literacy projects.

Phase two of the Skills for Tomorrow Project is now underway. Along with her three regional interns, Janice has developed a number of tools and resources to assist the union in understanding and promoting basic skill needs. The role of the national office is not direct delivery but advocacy, sensitization to the issue, and skill building with local union leaders who want to take on the issue.

In some cases, the result is programs being created with nearby educators; in other cases the local directs members to programs in the area. One of the most notable examples of local union delivery is the UNITE Education Centre in Winnipeg, Manitoba. There, the local has negotiated a training fund with employers that has allowed them to establish a popular education centre where programs can take ESL or literacy classes, learn to use computers, or achieve their grade twelve diploma.

Resources that have been developed include:

- A poster, media kit, pins, member agenda book, website, and articles in the national magazine “Action”
- Training sessions that give an overview of the project, explain union training guidelines, equity issues, literacy needs, the importance of clear language and how to develop goals and objectives and work with service providers
- A tool kit that can be used in conjunction with the training sessions outlining the key steps to setting up a union training committee, deciding on options for training, developing an action plan, negotiating language and initiating a program.

Asked what her key recommendations would be to others, Janice stressed the following:

- *Ensure that project planners gain the trust and confidence* of members, staff, and leaders at an early stage
- Be prepared that *newcomers recruited to the organization are well supported* and given sufficient time to orient themselves to their environment
- *Look at other models for guidance*
- *Encourage activists and local union leaders to raise the issues* through policy resolutions, debates and other discussions. This will attract the attention of higher-level leadership. Local union staff representatives play a critical role in creating local union action. “They are the ones who know what the needs are, and they know [literacy] is important,” says Janice.

Though there have been difficulties, Janice is enthusiastic about the project today. It is very much grounded at the local union level because of the interns, and has gained the attention and respect of managers and staff alike. She is particularly impressed and heartened by the growing interest and commitment on the part of the Canadian Director. “He understands essential skills now,” she says. “He is so passionate about it. The transformation is remarkable.”

UNITE's national recommendations

Recommendation #1:

UNITE will promote basic skills education programs across the country by:

- Developing a policy and principles for basic skills education
- Suggesting how members can get basic skills programs at their workplace or through UNITE offices
- Help UNITE staff to become better trainers
- Make UNITE education materials easier to read and understand
- Use every opportunity to support and increase basic skills education programs for members

Recommendation #2:

UNITE will help members and staff with issues around culture, language and race by:

- Giving members skills for working together
- Looking at other union programs on culture, language and race relations

Recommendation #3:

- UNITE will look for ways to pay for basic skills education programs for members by:
- Investigating the education funds that are available from all levels of the union
- Asking for seed money from the union to start up basic skills programs
- Looking for government funds for workplace education

Resolution on literacy – UNITE

The delegates to the *UNITE* 1997 Canadian Conference in Winnipeg, voted unanimously to adopt a Literacy and Second Language training resolution.

“Whereas employers, governments and unions often portray literacy and English as a second language (ESL) education as simply acquiring basic English reading, writing, mathematical and speaking skills; and

Whereas literacy and ESL should be far more in order to provide training which is empowering and be delivered in ways that are independent of getting and keeping employment; and

Whereas this training can also help us manage our personal lives better, allow us to help our children with their homework, help us to compete jobs or advancement, can help us to prepare for changes in our workplaces and society, can help us to participate in our political system more effectively and can remove barriers that prevent our members from fully participating in their union;

Therefore be it Resolved that the Canadian Office develop a plan to help our members implement a co-operative education program with employers, labour, universities, colleges, secondary schools, the learners and appropriate community organizations to help us participate in day to day life as described above; and

Be it Further Resolved that the Canadian Office Develop a plan to help our Joint Councils, Joint Boards and Locals to deliver Union sponsored Literacy and English as a Second Language training to our members.”