Union Educators: hidden strategists?

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The paper considers the role of union educators in New Zealand unions and argues that their particular skills and strengths are not utilised sufficiently in developing a strong democratic union movement, that union educators play an important role in the process of promoting worker participation in union activity and social change, and should be regarded as the hidden strategists of the union movement.

Introduction

One of the major goals of the union movement is to develop and engage in strategies and tactics for social change (Jesson, 2001). The success of this goal requires effective education of union members to develop an understanding of how they can play a role in achieving the union’s aims. Many forms of education can take place as unions work toward achieving goals of improved political, social and economic outcomes for working people. These range from formal professional development for union staff, through programmes for delegates, to informal meetings in workers homes. However, there has been little attention paid by the adult education community to the work carried out by educators in this field. At the same time union educators may face contestation around the importance, purpose and implementation of education from within the union movement itself. This has meant that the work of those involved in developing various strategies and tactics for social change, and for providing lifelong learning in a union context, has been largely invisible. Despite their invisibility we argue, in this paper, that union educators play an important role in the process of promoting worker participation in union activity and social change, and can be regarded as the hidden strategists of the union movement.

Union educators

Since 2001 New Zealand unions have provided a regular programme of workshop-based education for their members. In some unions the education is facilitated by the union organisers, or field officers, while some larger unions employ dedicated education staff.
Educators in the union context are expected to share and promote the union’s goals. Indeed, a background of political and organising work are regarded as essential criteria in the appointment of union educators (Jesson, 2002; Jesson, 2003). Those seeking to work in union education often do so because union values align with their own, and usually have a well developed sense of a need for radical social change. (Union educator interviews 2003)

**New Zealand trade unions: Some background**

The New Zealand Council of Trade Unions (NZCTU) is an affiliation of 35 different unions ranging from one of more than 55,000 members to some very small unions of less than 500 members. Each union pays a small affiliation fee per member for the work of the NZCTU. The NZCTU has a small staff based in a national office in Wellington, and the NZCTU Organising Centre, responsible for education, in Auckland. Most union members now are employed either directly in the state or in tax funded industries, e.g. teachers, nurses, social workers, local government (NZCTU, 2003). While there are also a number of ‘enterprise unions’\(^2\) which have emerged in the very recent past, never-the-less by far the majority of union members belong to NZCTU affiliates.

In 1990 the Employment Contracts Act (1990) (ECA) eliminated New Zealand unions’ status as legislatively recognised entities. Unions were relegated to voluntary bargaining agents on behalf of individuals in a contract for employment if an employer agreed. Anti-unionism became the cultural norm for many workplaces. In 10 years between 1990 and 1999 union membership dived from a 1989 high of around 55% of all wage and salary earners to a figure of just on 20%. Unions were forced to amalgamate to survive, and union education nearly died. The Trade Union Education Authority (TUEA) the tripartite organization set up for union education was dissolved. Education became mostly informal, to occur alongside contract bargaining, fighting closures, and general de-unionisation. Unions also tried to maintain involvement in organisations concerned about workers’ education such as various Industry Training Organisations (ITOs) and tertiary education institutions but with limited success.

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2 Enterprise unions are not part of a wider association, and generally exist to represent the workers at one site in discussions over wages with the management. They are sometimes known as “boss’s unions”.
In contrast, for private industry this era saw much of the industrial skills training provided through the state, either directly through Skill NZ funds to Industrial Training Organisations, (ITOs) or indirectly through the payment of tertiary costs to the university or polytechnics. (Foodstuffs NZ, the owners of the anti-union Pak and Save supermarkets, operate the largest state funded Private Tertiary Education (PTE) organization in New Zealand, through the Retail ITO providing training in supermarket operation skills for their own organisation).

**A new ERA of union education**

The fourth Labour Government replaced the anti-union ECA with a less draconian Employment Relations Act (ERA) in 2000. Unions were once again legislatively recognised entities. The new ERA also brought contestable funds ($5 million dollars over three years) to assist with the development and running costs of employment relations education (ERE) courses. These are approved courses provided by unions or employer groups that are eligible for Employment Relations Education Leave, (EREL), paid attendance time for union members. The purpose of this education was to increase the skills and knowledge of those engaging in employment relationship matters, to improve relationships in the workplace, and to enable the parties to the employment relationship to deal with each other in good faith. This education was justified legally as balancing the unequal power relation of the employment relationship. In order for workers to have paid time off to attend union education ERE courses had to be approved by a committee of experts, containing employers, unions, and education experts, and reporting to the Minister of Labour. The approval process required identification of specific, measurable outcomes that aligned with objectives detailed in the legislation. While the state was deeply embedded in union education there was again an environment conducive to union education.

**Discourses informing union education**

Union education differs from other adult education in that it is overtly political in nature. While the union movement has the common purpose of empowerment of working people, there are differing views on how this is best achieved, resulting in different motivations and approaches in union education. According to Devos (1998) the contemporary practice of union education is informed by two overlapping discourses of the economy and struggle. The dominant discourse of the economy is about economic orthodoxy and is informed by human resource management theory, with workers labour regarded as one of the resources to be
balanced against costs in the discipline of the market. Any benefits that workers gain will follow from increased production and economic growth (Devos, 1998; Jesson, 2003). Union education in this framework is intended to teach union members the skills and knowledge they need to organise for effective engagement with employers around distributing the benefits of this increased production. This creates a criteria-based instrumental education model focusing on measurable outcomes, which leaves aside critique of social and political structures (Jesson, 2003). Much of the ERE developed by unions fits this model. Education developed as ERE has been influenced by the requirement to focus on measurable outcomes, the restrictions on the type of education that attracts state funding and meets the eligibility criteria for EREL, along with a narrowed focus on the part of unions developed during the ECA era. Much union education has been developed in the form of tools or instrumental education; helping delegates learn industrial relations skills to aid the smooth operation of the relationship between workers and the employing organisation.

The second of the discourses identified by Devos is the discourse of struggle, which has traditionally informed union practice. This is centred on a belief that the relationship of workers and management is inherently one of conflict where management and workers do not have the same interests. Devos (1998) found that some of the union educators she surveyed interpreted this conflict as necessitating a radical pedagogy which encourages critique of political and social structures and involvement in social transformation. Such educators draw upon the ideas of community and social change educators such as Paulo Freire, Myles Horton and Saul Alinsky, (Alinsky, 1971) (Freire & Horton, 1991) incorporating dialogue, reflection and analysis of a collective participant experience and working towards social change outcomes (Jesson, 2003).

A central concept in social change pedagogy is praxis. This concept is often associated with Gramsci and Friere (Mayo, 1999). They saw participant experience and issues as the starting point of adult education, followed by the engagement of learners in critical reflection of their past experience and the social and political systems and structures that shaped it. They regarded adult education as a political exercise that should have transformation and action towards social change as both process and outcome. Each saw action based on reflection as leading to further reflection and action, continuing the cycle of praxis.
The Canadian trade union educator and student of Freire, D’Arcy Martin (Martin, 1998) points out the ideas of social transformation educators may sit uncomfortably in a union setting. Labour activists, he suggests, tend to gain leadership positions by speaking, not by reflective listening; they tend to mobilize people behind tangible goals, not to problematise the goals themselves, and they emphasize the power of unity, not the painful process by which differences are put on the table in order to build allegiances and coalitions (p.124). There can also be a tendency to evaluate political action programmes by the outcomes achieved rather than either the philosophical goals or the complex process of achieving the outcome (Shaw, 2001). However, ERE can provide the potential for union members to access education informed by this radical discourse. Some union educators use the opportunity of paid union education leave to investigate the possibility that society could be different, and to involve members in work for social change. However, as we shall describe later this can mean that union educators seeking to adopt a radical pedagogy may find themselves at odds with the dominant practice of the organisations for which they work.

**The importance of a radical pedagogy for achieving union objectives**

To consider the proposition that union educators are social action strategists in more depth we will consider some theoretical views of this struggle for ideas. The most basic and well-known idea is Gramsci’s concept of "hegemony" (Gramsci, 1976). For Gramsci, "hegemony" enables the dominance of one group of people by another group. This is not a matter of dominance by force. Rather, hegemony is the set of ideas by which dominant groups in society gain the consent of subordinate groups to their rule. It is important to note the emphasis on consent. A governing class must succeed in persuading the governed to accept the moral, political and cultural values needed by those in power. These ideas are hegemonic when they are accepted as common sense. Gramsci suggested that groups seeking to overturn their marginalisation would need to create a strong understanding of their own common view, their own "common sense". Those who wished to break the "existing hegemony" had to build a "counter hegemony" to that of the ruling class. It was necessary to change the minds, to change the popular consensus, in order to change the way institutions work. In sum, to help the people question the right of their leaders to rule in the hitherto accepted way, it is necessary to undertake a radical education for a new ideology. In union education this new common sense is the development of a democratic idea of unionism that is concerned with social change and inclusion.
Implementing a radical pedagogy

The ability of the union educator to implement a radical pedagogy with the potential of developing social change depends on the position they hold within the relationships of power within the union itself. Australian trade union educator Michael Newman (Newman, 1993) has developed a model to analyse the relationships between the various players in union education (Martin, 1994). Newman’s model of “three contracts” portrays the relationships of power between the union organisation, the educator and the union members/participants. This model suggests a critical but tension-laden role for union educators.

The first and second contracts in union education are top down, with the purpose and outcomes decided upon and communicated within what is essentially a hierarchical structure. The first contract is between the union organisation and the educator. The union organisation (in association with the State in the form of the ERA) determines what is required to be taught creating organizational imperatives on the educator’s work. The second contract, between the educator and the course participants, also takes a top down form with objectives decided upon by the educator who also adopts an approach they hope will achieve these aims.

The third contract is between the union organisation and the union members, and it is here that union educators potentially play a key long-term strategic role. It is in the third contract that Newman sees possibilities for the educator to disrupt the hierarchical relationship between union leadership and members, facilitating the democratic potential of union education. The educator is offered an opportunity to enable a shift from an instrumental educational approach, focusing on pre-decided skills outcomes, to a more radical approach, where the members make decisions and take action for social and political change, setting their own agenda for their union (Newman, 1993). The members thereby are encouraged to engage in the union as their organisation and identify themselves as union; to move to a position of “we are the union”.

The role of the union educator in this third contract is not neutral; it is in a state of continual tension. (see figure One below) To implement a radical pedagogy requires active engagement in critical reflection and consideration of the strategies that will allow the democratic potential of union education to be realised. In the words of Freire (Freire & Horton,
“[t]he educator must know, in favour of whom and in favour of what he or she wants” (p. 100). In a union setting acknowledging different perspectives can sometimes cause tension. Justifying the status quo, dominant groups within the union, often from the existing power elite, argue that new perspectives and new voices challenge one of the central discourses of unionism: that of unity (Bloch & Hayes). Challenging this view, Ellsworth (1992, p. 107) argues that unity is something that must be “chosen and struggled for” rather than assumed.

Figure One  Union Educators: Potential Conflicts and Tensions

To illustrate what radical intervention in Newmans third contract can look like in practice we look below at the experience of one of us of developing union education for a young members’ network, and examine how democratic unionism can create tension within a union.

Contestation- an example

In September 2002 a national conference was held for a newly established young union members’ network. This conference had interconnected educational and organisational goals; to move current active members into playing a leadership role and to spread the base of the young members’ network beyond Auckland. The conference covered topics such as information on employment agreements, and included strategy sessions on planning for the future of the network. The focus was on exploring issues and moving towards taking action around these. The aim was for participants to not only understand their rights in the workplace, but also to formulate plans on how they could ensure these rights were protected.
and improved. In other words the strategy was for the development of participative unionism around the issues of members.

In the process of setting the agenda the education organisers encountered contestation from the union leadership. Initially there was a request from the national office that particular topics and guest speakers be included. The educators were thus being constructed as technical operatives responsible for implementing the organizational imperatives of the union leadership, but not its planning. The concern of the organisers was that including these requests would not allow time to develop their strategic goals and would change the focus from a radical approach, based around formulating action plans, to a more traditional curriculum focusing on the passive receipt of knowledge. One particular session was singled out by leadership as not being suitable. This session focused on the use of fixed term employment agreements to employ new workers, which are often unjustified and disadvantage young workers. However those responsible for using these agreements were management, who in this case were also union members, and heavily represented in the union leadership. The proposed session was deemed to be an “attack” on the management members. The discourse of unity was used to restrict the agenda. Yet an analysis of why these agreements were being used, and who was responsible for those decisions, was critical to the formulation of a response. The head office advice was to restrict this session to an explanation of related sections of the law and employment agreements. Of all of the changes suggested this was the one that caused the greatest concern as the educators believed that they would undermine the strategy of promoting the interests of the course participants.

Freire (1990) argues that if ideas are taught with no reference to how they play out in a wider political context then the educator, rather than being neutral, is reinforcing and condoning that political context. This is the dilemma the educators in this situation were faced with. If they described what should happen in regard to the use of fixed term agreements but didn’t encourage discussion around why they were being used inappropriately, who was responsible, and what could be done, then they would be implicitly condoning the situation. What did the educators do? – To hark back to Freire’s (1990, p. 100) quote above, they knew how “in favour of whom and in favour of what” they wanted the workshop to be. In the event education subversion took place, the session was scheduled at a time when no union leadership was present and the educators carried on as they intended.
Consequences of following a radical agenda

This experience of negotiating between the needs of the members and the will of the organisation is an example of mediating the third contract described by Newman (1993). Indeed, Newman warns that choosing to follow the path formed by radical community educators can lead union educators into conflict with their employer. This conflict was something the organizers of the young members’ network were to experience more vividly around a month later at the annual general meeting of the union. At the beginning of the AGM there was traditionally a workshop for new members, to teach them the process and protocols of the meeting. The organisers of the young members’ network felt this time could be better used to explore how the issues and plans the young members’ network had identified at the earlier conference could be progressed at this meeting of the wider union membership. They dramatically reformatted the agenda of the pre-meeting workshop so young members could recap issues, identify relevant parts of the AGM agenda, and establish interest groups to co-ordinate how their perspectives would be voiced. In addition they discussed effective lobbying techniques and political strategy. This time the response from leadership after the meeting was a firm direction to stop interfering. However, throughout the meeting young members played a prominent role bringing their issues to the fore, and were even congratulated by other members.

Reflecting on the attempts at radical education practice

The example above reflects a belief about the role of union educators in regard to the relationships between union members and the union organisation, Newman’s third contract. This belief is that this should be a democratic rather than hierarchical relationship. This requires changes in the relationships of the first and second contracts, between the union organisation and educator, and the educator and the union members. The hierarchical nature of these relationships needs to be challenged in order to create a pedagogy that encompasses and promotes the members’ perspectives.

However, the presence of differing contested perspectives is not the full measure of effective radical education. Neither is the inclusion of discussion and analysis of the political and social context of the participants’ everyday reality. The most important outcome for radical
pedagogy is the facilitation of praxis: putting into practice critically informed plans for action and change around issues that disadvantage or concern participants.

In the current union education environment of ERE maintaining the ongoing cycle of action / theory / action that is needed to facilitate praxis is very challenging. The pedagogy of social transformation mapped out by community educators is based on an open-ended process of education, where participants engage in ongoing analysis of experience, critique of social structures and formulation of plans for social change. However, as shown in figure 1 and demonstrated above union educators face tensions and conflicts between long term radical strategies and immediate instructional requirements. Yet, in spite of this some open ended radical education is occurring in some New Zealand unions; organisations such as the Service and Food Workers Union and Finsec (the finance sector union) have embraced this approach and it is also the approach encouraged by the New Zealand Council of Trade Unions. (NZCTU 2003 Rebuilding Unionism Report CTU Biennial Conference)

However, this is at odds with the dominant instrumental approach to union education implemented by some New Zealand unions. Rather than a radical programme such unions have, sometimes consciously and sometimes by default, chosen a programme of one-off skill development and knowledge imparting workshops. Through adopting an instrumental rather than a radical programme, they risk reducing the opportunities for their membership to effectively challenge and shape their unions objectives, or to build an effective social action movement union.

**Developing possibilities**

Unions that have instituted a radical educational approach have developed programmes that aim to develop activists and support them in a process of increasing activism and union involvement. The stages are as follows: union organisers identify potential activists, going on union education courses with them, encouraging and supporting them as they in turn work to involve other members in the development of strategies for workplace and social change.

Another important strategic component of radical education for social change is the linking of local concerns to wider societal structural issues concerning the union movement. For example the Service and Food Workers Union campaign around better pay rates for care workers is situated within a wider programme of developing an understanding of the
gendered nature of work and the status that is accorded to predominantly female occupations. The Finsec members from one bank call centre have attempted to overturn a policy that requires them to log onto their computers before their designated start time. Their campaign is linked to and developed within a wider context of calling for a recognition that working people can expect a reasonable work / life balance that recognises family and social interests and commitments. In these unions the education programme and the union organising campaigns are totally integrated. Education is all about strategising social change.

**Union Educator as strategist.**

The role of the union educator as “strategist” is to promote the democratic potential of union education and seek possibilities through this education for action and social change. Their role is to negotiate the types of courses and the educational processes that the union will utilize. They are able to help the union leadership and the union organisers clarify their goals and determine useful tactics. The full potential of union education can only be met when the role of the union educator is recognised as not being that of an instrumental education technician but as a strategist for the realisation of democratic unionism.
REFERENCES


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