WORKER EDUCATION

A GUIDE FOR TRADE UNIONS

ILRIG
CAPE TOWN

Worker Education A Guide for Trade Unions

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Introduction

During the last two decades a lot has changed in many aspects of our lives. One of the biggest influences on these changes has been the rise of globalisation which emerged as a different way of doing business. These changes impacted on many things in the spheres of economic, politics, culture, our daily lives and our workplaces. These changes has also impacted on the organisations that we belong to, including our trade unions. Trade unions are constantly having to grapple with new ways of organising, new ways of struggles and new ways of doing education.

Sometimes trade unions find themselves bogged down in endless committees, sub-committees and have to attend meeting after meeting trying to find solutions to problems in a company, a sector or even an industry. Previously this was not the domain of trade unions. It was never seen as the work of trade unions to try to find ways to save a dying manufacturing sector. Similarly it was not seen as the role of trade unions to provide skills training for workers. Now however, trade unions are seeking accredited training for its members and staff. Training on how to be an effective union organiser is fast becoming a marketable skill, rather than a passion for which a person feels strongly for. However, globalisation has seemingly found a way of making the interests of capital seem the same as that of labour. These changes pose many challenges for trade unions and included in these challenges is trade unions education.

During the 1970s and 1980s, trade union education was seen as activities that would strengthen organisation, empower worker leaders and provide political understanding of struggles. These activities included training on how to manage a strike, or how to mobilise communities to support workers struggles. Some of this education was to understand alternative economic systems like socialism and how to organise society differently and more equitably. While formal educational activities were used, many of these activities were informal and took place in other constitutional and non-constitutional structures of the unions. Today, the emphasis seems to be on formal education activities and more and more, union leadership wants to have training at a tertiary institution with and accredited certificate or diploma.

Even at the level of more formal trade union education activities, there have been discussion and views on what are the best methods of trade union education. There are some who favour “old style” methods of presentations, group work and report backs. There are those who favour new forms of education where no presentations are made, where no group reading takes place, where very little structured activities are prepared for. This view prefers that education must be all fun and no hard work. Still, there are those who see value in both these forms of educational activities and argue for a more integrated approach where both methods are used depending on what is to be learnt.

These are some of the issues which face trade unionists who are faced with providing trade union education. This worker education booklet is an attempt to raise some of the issues, and address some of the views held by educators. The book is divided into two sections, approaches to trade union education and the practice of trade union education.

The first section dealing with approaches to trade union education, looks at some of the changes taking place in the realm of trade union education. This section looks at issues like the rising new language emerging in trade union education (recognition of prior learning, SETAs, NQF, accreditation…) It also looks at breaking from the old mode of trade union education but cautions about ditching everything of the past as being useless.

Section two looks at some of the more practical aspects of trade union education, like how to plan a workshop, how to use different methods effectively, what are the benefits and weakness of using specific education methods like role plays, group work, audio visual aids.

This booklet is provided as a guide to trade union educators and other trade unionists involved in education activities as well as those who are interested in some of the debates and issues around trade union education. Its aims are to provide union educators with the tools to reflect on overall approaches to trade union education and to reflect on practical experiences of implementing trade union education activities. ◀

SECTION I
APPROACHES TO WORKER EDUCATION

What is trade union education?

Who taught us to overthrow apartheid? No one. We taught ourselves.
– NUMSA worker leader, 1998

These days worker education likely means one of two things. Firstly it could be workshops. Sitting somewhere in a hotel, eating a big fat buffet lunch, watching the colour TV with M-Net in your room, and working in small groups in order to write lots of things down on flip charts. Secondly, it could mean qualifications according to the NQF– a career path – pay rises, promotions, multi-skilling. Maybe you will be the one who goes from a sweeper to an engineer.

Who taught us to overthrow apartheid? No one. We taught ourselves.

Both of these forms of education can be useful to workers. There are lots of important issues for workers which can likely best learnt in some sort of formal classroom type situation – how the LRA works, what is contained in GEAR, how do we balance the union's accounts. At the same time, workers and the economy as a whole do need skills. Skills mean higher wages, more job satisfaction and more production.

But while these two most common forms of education do benefit workers, we need to ask another question: do they benefit the organised working class – the trade union movement? To answer this question we need to first look at the features of a strong trade union and then assess to what extent education can contribute to building these strengths.

There are seven things which make a strong trade union:
1) providing effective service to members
2) the ability to mobilise members
3) the ability to recruit new members
4) the ability to plan and implement a programme of action
5) the ability to manage resources efficiently and honestly
6) developing and maintaining a vision for the working class
7) building solidarity amongst members

Any union which can claim to have all these features will be a powerful force indeed. The question is: what role does education play in strengthening these seven features?

Clearly there are a number of ways in which formal, workshop type training could help strengthen some of these features. For example, resource management requires that some union staff and worker leaders be trained in accounts or financial management. For an organiser, providing effective service may require training in time management, maintaining a filing system, or negotiation skills. Once again the union may choose to train people in these skills through the use of formal workshops.

We must not ignore how important it is for union officials and worker leaders to acquire the types of organisational skills which can make the union effective. But at the same time, there are many things which are best learnt outside a formal workshop or course structure. Ultimately a skilled staff will not contribute to building a powerful union if the organisation has no common vision for its members and no sense of solidarity with other members and other workers. Vision and solidarity do not emerge from workshops or formal courses. They grow out of the experience of workers in building their organisation, in engaging and confronting the employers, the government, their leadership and even each other over the issues which affect their lives. This is the education process that the NUMSA worker leader referred to in the quote that opened this paper. He was saying that the most important political victory of the South African working class – the overthrow of apartheid came about because workers learned how to achieve that victory from each other.

...the overthrow of apartheid came about because workers learned how to achieve that victory from each other.

Now, there are ways in which a skilled educator can draw on the vision and solidarity of union members to make workshops more effective. But the educator cannot rebuild the union. If the members believe that their leadership is corrupt, that their structures are ineffective, that their money is being "chowed" by the union investment company, even the best educator will not be able to turn the situation around. For that to happen, a different educational process is needed. Workers must find their own ways to address the problems of the union. They must come up with ways to make leadership more accountable or more focused on workers' needs. Responding collectively within the union to worker problems is also an educational process. Workers learn how to build and strengthen their organisation through participating in the life of the organisation. Every strike, every stayaway, every wage negotiation, every congress is also an educational event for workers.

The point here is that nearly all of the work of the union can be viewed as part of an educational or learning process. We can divide this educational process into two categories: formal educational events – workshops, courses – any situation where workers come together in an organised way with the express purpose of learning a certain content or skill. But there are also a wide range of informal activities, which are educational, situations where people learn by doing, by struggling, by debating or by building a campaign. Although lots of learning takes place in these informal activities, the stated goal of such activities is not education – it is something else – higher wages, better working conditions, an end to retrenchments, a more accountable union leadership.

Such activities can be combined with more formal workshops or courses to provide a broad educational strategy to drive the union forward as an effective force for serving the interests of the working class. But workshops and courses alone will never make a complete programme of education. Formal educational events should be in the service of the broad programme of the union. In fact, we could say that the entire workers' struggle is an educational process. We learn from all aspects of that process. ◀

The changing language of trade union education

Globalisation has brought about many changes in the world. There are changes to the world economy, changes to government policies, changes in how the state organises itself and changes affecting how trade unions conduct their business. Of these changes, trade union education has undergone some changes. Despite the fact that change is not always bad, and change is inevitable, it will be important to look at these changes and how they impact on what has been intended by trade union education.

In one of the articles the question is asked, "who taught us to overthrow apartheid?" And the answer is "No one, we taught ourselves." This is a very simple, yet powerful way of looking at what is trade union education. Today, under globalisation new terms are emerging in the realm of trade union education. Some of these include, accreditation, "life long learning", recognition of prior learning or RPL, skills development. And the common theme in discussions on trade union education relate to this being part of the national qualifications forum (NQF), SETAs… but we need to ask ourselves what is trade union education and is there a difference in this and education that trade unionists undergo?

...trade union education has been part of the movement of building organisations of the working class

Historically, trade union education has been part of the movement of building organisations of the working class. In this process everyone involved would learn different skills from the social interaction of these organisations with other bodies. For example, in the process of an industrial action like a strike, union activists learnt how to negotiate, how to mobilise communities to support them and how to use media to popularise the strike. Sometimes these were learnt in more formal sessions where sympathetic organisations would provide training in a very practical way. These skills were very real skills learnt, but no one was ever accredited when acquiring these skills.

Later these more planned educational activities took the form of workshops where organisational skills were learnt, political analysis was learnt, how to take minutes, account financially, how to chair a meeting, etc, were learnt. Workshops were held where draft constitutions of organisations were drawn up, resolutions were developed, negotiating skills were learnt. In this process, an enormous amount of skills were imparted and soaked up. None of these were accredited. During this time, different creative educational methods were developed like theatre, music, posters art, poetry were used as educational media.

However, we have come a long way since then. In the process, at some levels, it seems that the most dominant form of educational activity to emerge was the formal workshop. Later on, as things began to change, more and more, trade unionists were beginning to demand some kind of certificate to prove that they attended a

particular workshop. This soon became a means of accreditation within the labour movement.

Now the question arises, can these skills become accredited? Can shopsteward training be accredited? Will this not create competitiveness among comrades? Will this not turn being a shopsteward into a profession rather than an elected position which could change? Can this not lead to a situation where a worker has to produce his or her qualification to stand as a shopsteward?

The changes taking place in the world economy, in the sphere of politics, in the workplace and in our communities, impact on how we see the collective. More and more we are being convinced that the individual is more important than the collective. More and more trade unions are focusing on issues of the sector, industry or the workplace. Less emphasis is being put on broader socio-political activities. This impacts on the attitude to education. Now emphasis is being placed on trade union education being accredited, skills based, modular and certificated. This means that trade union education is moving away from collective learning for action, and more towards individual learning for the acquiring of skills. Of course these skills are meant to be portable, implying that these will assist in job applications. In one example a worker activist had the following to say:

> *"I want a piece of paper. I know it might not mean much to others, but it gives me a little bit of assurance. When the boss comes round looking for retrenchments I think maybe this might help me."*
> – Ditsela Pathways, May 2001 pg 10

This further illustrates the point that possibly the attitude to trade union education is for individual enskilling rather than collective learning for action.

In other examples, there are stories of how shopstewards were appointed as trainee managers after having gone to trade union courses that are accredited – one typical example was the Workers College 8 week block after which many shopstewards who attended were promoted to some management position.

This is not to say that individual education and enskilling is any less valued, however, the question that arises is, can this be called trade union education? We have to recognise and maintain the separation between trade union education and education that trade unionists attend for individual gain. This is also not to say that labour organisations and institutions of education can not provide such training. However, there should always be the separation between what is trade union education and what is education for individual skills.

On the question, can trade union education be accredited, there is a view that because of the demand for certification and accreditation, institutions and organisations can no longer afford to ignore this and remain relevant. Ignore at your peril and be marginalised. However, there is another view which holds that the very nature of trade union education being collective learning for action, means that it cannot be accredited or certificated. Collective means for all together, who then will be certificated, who will be accredited? How would a course on "how to manage a strike" or "how can women organise against globalisation" or "how to live with HIV/AIDS" be accredited. Or would these no longer be recognised as valid education activities.

Another of the assumptions made is that trade union education equals workshops or courses. The view that trade union education can take many forms and that the learning of skills can happen at many different activities, even those that are not formally education activities (like a mass mobilisation meeting, like an industrial action in a workplace, like a union congress) is becoming less popular. How are these educative activities going to be accredited or even certificated, or are they not recognised as learning activities? ◀

Down with missionaries and objective academics: Some thoughts on political education for unions

In an era where economic meltdown, globalisation, and retrenchments are making the news on a daily basis, worker education cannot avoid the obvious – as in every other period workers issues are political issues. Avoiding politics means surrendering to transnational corporations, opportunistic local business and bureaucratic government leaders. The key question is not whether to politicise union education but how to politicise union education.

Two common approaches: The "missionary" and the "objective academic"

Let's begin by outlining two common approaches to political education. The first approach is called the missionary approach. The missionary educator generally has a "correct" view on every question. For the missionary, workshops are two things – a platform for personal views and an opportunity to win new converts. The missionary reacts to anyone with a different opinion as a "troublemaker" to be crushed. "The union is no place for reactionaries" the missionary might say about such dissidents.

A second common approach to political education is called the "objective academic" approach. The "objective academic" also has views on all the key questions of the day. But unlike the missionary, "objective academics" try to hide their views. They present all positions as if they carry equal weight and validity. The "objective academic" justifies this approach by arguing that workers themselves must decide – that a facilitator must avoid imposing any views on participants. To do so would be denying the value of the experience of the workers and their ability to think independently.

The educational approaches of both the missionary and the objective academic are problematic. Ultimately, these approaches are informed by a bankrupt notion of workers and worker organisations. The missionary sees union members as passive zealots who chant slogans and repeat key phrases without being able to analyse or criticise. The rank and file are shock troops, the leaders (including the educators) are the thinkers.

On the other hand, the objective academic sees unions as debating societies, not as organisations engaged in struggle. While unions do need members who can critically analyse issues, the purpose of worker organisations is not simply to interpret the world but to change it in ways that advance the interests of the working class. To do this workers must be united around a programme of

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action which includes clear positions on the key questions of the day. A union cannot wait until every worker can write a ten page essay on the "Ideological Biases of Econometrics" before rejecting GEAR!

Posing an alternative

The next question should logically be: how do we avoid being either missionaries or objective academics?

There is no easy answer, no ready made formula. However, an important starting point is reflecting on the role of our views in a workshop. A key issue is: How and when do we express these views?

It is dishonest to pretend we don't have opinions, but it is also destructive to use our views as a sledge hammer to hit people over the head. Sledge hammer tactics will silence differing opinions. Not everyone with a dissident view has the confidence or will to debate the facilitator, especially if their opinions may not be shared by the majority. But from an educational perspective, dissident views are very important to the learning process. People who come with a different postion often promote debate amongst participants and force everyone, including the educator, to interrogate their own thinking more thoroughly. As educators our first reaction to dissident views should not be to counterattack. We should begin by asking for responses from the participants themselves. The views drawn from participants then beomce the spark for debate. If we do not immediately find a variety of perspectives, we may need to ask questions which draw out a counter position. Queries such as "what is the government's position on this question?" or "how would business respond to labour on this issue?" or "what would be a socialist view on this topic?" may help participants to see issues and their own positions in new ways.

Once a debate or discussion has come to a close, we also need the ability to reconstruct the key points of the debate. Discussions can often take many right and left turns over the course of a few minutes. It is the task of the facilitator to remember the journey taken and recount it for participants. Through the sumup, the educator tries to ensure that participants are collectively aware of the main lessons learned in the session.

A sumup should indicate where the debate has gone, what contradictions have been brought out, what consensus has been achieved, and, perhaps most importantly, what questions may have been ignored, overlooked, or are in need of further exploration.

Planning the learning process

But constructing an environment of open and directed debate is only one part of the task in political education. Much of the success or failure of a workshop hinges on planning the learning process. To illustrate this, let us take the example of a workshop on GEAR. One

method to run such a workshop would be to summarise the contents of GEAR in plenary, put the participants into groups and have all of them read the COSATU resolutions on GEAR. Then each group could report back on why GEAR must be rejected. While such a process could be useful, there are more effective ways to promote critical thinking about GEAR. For instance, instead of giving all participants COSATU documents to read, different groups could read different documents. One group could read the views of business, another the opinions of government. Then each group could report back on the different perspectives regarding GEAR. This type of process would push participants to see GEAR in new ways, from different class and political perspectives. The purpose is to encourage workers to understand the logic and class interests of such a neoliberal economic policy. Through critically engaging different views on GEAR, participants can begin to see this macroeconomic framework not as simply a policy to reject but as part of certain way of viewing and structuring the economy in the era of globalisation. In this way we will promote the rejection of GEAR on the basis of its content. Our goal in this instance is to ensure that participants reject all economic policies which are based on neoliberal principles, not simply because the federation has passed a resolution.

Organising workshops in this way is hard work. To plan an effective session an educator may spend more hours preparing than in the workshop itself. It is much quicker to photocopy COSATU resolutions than to search for business and government documents and compile them in a way that participants can use them effectively. Going beyond the COSATU resolutions also implies that educators themselves need to study the business and government positions and not simply parrot labour's views. This then means that we must accept that as educators we are not only facilitators or teachers, we are also learners.

When do we present our own views?

In the preceding paragraphs situations and learning processes where the educator gives their own views a back seat and tries to provide an effective forum for participants to debate and discuss have been highlighted. While in many instances such an approach may be effective, there are many exceptions to the rule.

For example, you could facilitate a workshop which reaches a consensus which is the exact opposite of your own view. In such instances, you may even think that the collective opinion of the workshop is completely anti-working class. Consequently, you may feel both a political and personal responsibility to present an alternative. For example, it is entirely possible that a workshop could conclude that foreign workers should be deported or that gays should not be allowed to hold leadership positions in unions. Since both of these views as anti-working class and reactionary, a progressive facilitator in such a workshop would likely choose to contest the consensus. In doing so, it would be important to avoid the temptation to scold or call people names. An alternative would

be to interrogate the workshop's positions with critical questions such as: "How would you justify your position on deportation of foreign workers to unions in Mozambique or Zimbabwe?" Or: "Is there any contradiction between the fact that gays are guaranteed full democratic rights in the constitution and your position to exclude them from leadership positions in the union?" Nonetheless, whatever facilitation technique is chosen, the participants must become aware that a clear alternative does exist and that some people, the facilitator included, strongly disagree with their position.

Conclusion

Unions can only be democratic organisations when their membership thinks and acts in a critical but progressive manner. A programme of political education directed at building such critical thinkers requires a lot of work and considerable discipline on the part of educators. To be successful in developing such a programme also requires that educator seriously reflect on their own approach to education. ◀

Education on globalisation for unions

Note: this article has was written by John Pape for another publication called *Workers' Education* of a trade union education organisation, International Federation of Workers' Education Associations (IFWEA). It remains useful and has therefore been included in this booklet.

Globalisation presents enormous challenges for the labour movement. As a topic for educators, globalisation is perhaps no less problematic. A number of issues spring to mind whenever a request comes to do a workshop on this topic:

- What are the goals of your workshop?
- Where do you start?
- How do you make the topic relevant to workers' daily lives without oversimplifying?
- How do you finish so that participants feel upbeat and not totally demoralised?
- What materials do you use?

What are the goals of your workshop

Whether your workshop is one hour or several weeks, we have two main points about globalisation that we want participants to understand:

1) that globalisation is not "too complicated" for workers to understand

2) that globalisation is an issue of contestation and struggle – not a "neutral" or "inevitable" process

Apart from this, we include a number of content areas we see as key to understanding globalisation. These are:

- globalisation is the result of a crisis in capitalist profitability
- globalisation involves a changed role for the state, not the disappearance of the state
- globalisation has meant an increased role for finance capital
- globalisation is not gender-neutral
- international solidarity is needed to contest globalisation effectively

Where do you start?

Even with a topic as big and complex as globalisation, we avoid starting with "expert" inputs. As proponents of critical pedagogy we try to begin with participants' experience. Depending on time, there are two ways we might approach this. If time is limited – we simply ask the participants for their impressions/reactions to the term "globalisation". In longer workshops, we break people into groups and get them to discuss the main issues which they confront in their lives – both at the workplace and in their communities. After they list the major issues, we then get them to discuss which ones have changed and which have stayed the same over the past five years.

Even with a topic as big and complex as globalisation, we avoid starting with "expert" inputs.

Regardless of which method we use, our facilitators then record the responses and group them under three major headings: Changes in the Workplace, Restructuring of the International Economy, and Changes in the Role of the State. This helps to link their lived experience with the overall issue of globalisation.

These headings form the framework for the remainder of the workshop – regardless of the length. We would typically follow up this group work with a short input (1 hr) structured around the first three of the above headings. In the event of a longer workshop, we would later have half day or one day sessions on the first three headings. All of these sessions would use an interactive approach. The nature of some of these will be detailed below.

How do you make the topic relevant to workers' lives without oversimplifying?

The first part of answering this question relates to finding ways to access and make use of participants' experience. But globalisation is more than the subjective interpretation of lived experience. At some point, it is necessary to directly engage with the more complex and technical aspects of globalisation. We address this issues when putting together our input on the overall globalisation process.

One approach would be to dazzle participants statistics on growth of international trade and speculative investment. While interesting and useful, this method tends to overwhelm participants with figures rather than building analytical skills.

To avoid the this trap, we frame our content in the context of debates between the supporters and opponents of globalisation. Although we count ourselves amongst the opponents our purpose as educators is not pushing our positions but present a range of views. Typically we begin our input on globalisation by asking participants to read short quotes. These come from Renato Ruggiero of the WTO, the ICFTU, Bill Clinton, and our very own COSATU. This starts us off by characterising globalisation as an issue of struggle and contestation.

This approach carries over to presentation of the various aspects of globalisation: production, trade investment, technology, finance, etc. For these sub-topics our content is structured under the following sub-headings: What Has Changed, What the Supporters Say, What the Opponents Say. For example, under the sub-heading production we would talk about how some production processes (e.g. motorcars) now take place through a global division of labour. We would then note that supporters characterise this as moving toward a "global factory" where production could be carried out anywhere that enhanced efficiency and profits. We would similarly note that opponents argue that a "global factory" is not actually anything like the reality that exists or is likely to exist. They point to the continued dominance of

Northern-based TNCs in this global production process and the ways in which certain expertise such as Research and Development remains dominated by the North.

By presenting the material in the context of a debate and asking participants to develop a position in the debate, the issues take on a relevance to the workers. Instead of being overwhelmed by investment or trade figures, the hard data becomes secondary (but an integral part of) a understanding of the process and formulating a position in the debate.

How do you finish so that participants' feel upbeat and not totally demoralised?

Perhaps this remains the most difficult challenge. One option is to present participants with a list of all the campaigns that are taking place around this issue. Such information is useful but often appears a bit distant, particularly to worker leaders who are not involved at the national level.

One alternative we have tried is a role play. We divide the participants into three groups and ask each one to organise a speaker to participate in a "Public Forumof Experts" on how South Africa should respond to globalisation. We ask one group to put forward a speaker to represent the views of the South African Chamber of Business, another group to represent the views of the Department of Trade and Industry and the last group to represent COSATU.

This approach is not without its faults (which I will note below) however, it does have two advantages. First, it forces the participants to engage with all the material of the workshop and shape it into one coherent view. Second, it gives participants, not the facilitator, the last word in the workshop. This can quite often end the workshop on an upbeat and empowering tone.

What material to use

There is a wealth of material out there – much of it totally useless for workshop purposes. We have developed our own booklet which we use as the major reading for the course. Depending on the time for the workshop, we often put participants into groups to read certain parts of it and report back. We particularly make use of group reading and tasks on some of the more technical topics before we make our own inputs.

Conclusion

Education about globalisation is an imposing, yet exciting task. Despite the enormity of the subject, we must not throw out interactive and participatory methods to make sure we "cover everything". For globalisation, as with any topic, participants tend to only understand and use what they work with, not what they simply hear from a facilitator. Moreover, without interactive methods, a facilitator denies themselves a most important learning opportunity – learning from the participants.

Nonetheless, interactive methods can present some difficulties as well. I will mention two of these in relation to our experience. First, in setting up globalisation as a topic of debate, there can be oversimplification of positions. Time may not permit sufficient interrogation of such views.

Secondly, our concluding role play runs some other risks. With such a process, the most articulate speaker may gain converts on the basis of oratorical skills, not content. This can be a particularly hollow victory if the point of view which wins the day is not shared by the facilitator or the speaker herself. We are experimenting with simulation exercises as possible antidotes to this problem.

There are many other points which could be made here. Education about globalisation, like the topic itself, is extremely broad and challenging. Time frames limit how much we can achieve. But we hope that in both our workshops and in this little written piece we provide a bit of stimulus to help people to continue rising to the challenge of the struggle against globalisation. ◀

Congress: Active or passive learning for the union?

Most trade unionists think of a Congress as a political event – a time where the union elects its leadership and puts forward resolutions on the burning issues of the day. But educators can look at the Congress from a different angle. Perhaps the Congress is the most important collective and individual learning process in the life of the union. The problem is, all too often very little attention is paid to the learning process of the Congress. Let us look at this issue briefly.

The simplest way to unpack the learning process in a Congress is to use the ideas of passive and active learning. Under passive learning, participants simply receive information from facilitators, experts or leaders. With active learning, participants are involved in thinking, speaking, acting – they learn by doing.

Perhaps the Congress is the most important collective and individual learning process in the life of the union.

In any Congress there is a tension between passive and active learning processes. This tension comes about for a number of reasons. Firstly, building an active learning process into the Congress takes more time and usually requires more resources. The union may simply not be able to afford some of the key steps in an active process – or they may lack the capacity to get them done. Secondly, at a Congress there are always many more agenda items than can be covered in the time available. The quickest way to get through lots of agenda items is to squash participation and let the leadership at the table do the talking and decision-making. But on the other hand, there is the pressure from below. In any Congress, the delegates want to be heard. They want their views on many issues (including some which are not on the agenda) to be heard. Delegates often see a Congress as the moment where leadership must listen to their issues, no matter how long it takes.

No Congress can completely address all of these tensions. There will always be issues on the agenda which were not fully covered. There will always be people who wanted to speak on a certain issue who did not get the chance. But there are ways to make Congresses a more active learning process for delegates and ultimately for the union. Let's look at three areas and compare a passive and an active approach to handling these in a Congress: planning before the Congress, resolutions, and reports from leadership.

Planning for a congress

Planning makes the learning process in the Congress more structured. Through adequate planning, delegates are able to know what to expect at a Congress and prepare themselves accordingly. Proper planning includes distributing crucial documents ahead of the Congress. This gives delegates time to familiarise themselves with the key issues. But preparation should include more than just sharing documents. Holding preparation meetings at regional and even branch level helps make the learning process of Congress spread

deeper within the ranks of the union. Without this type of process, Congress becomes something far away, like decisions taken at a Cabinet meeting or in the United Nations General Assembly.

Moreover, preparation meetings may be more effective if educators play a leading in structuring the process. The role of the educator is to ensure that key issues are debated and different positions are fully explored. This means approaching these debates in a workshop fashion, rather than in simply briefing participants on the union's views on key issues. This then brings us to our second issue: resolutions.

Resolutions

Any union has a number of issues on which they want to pronounce at Congress: government policy, the international balance of forces, problems of organisation in the union itself. In a passive process, the resolutions are formulated by leadership and circulated for approval, or at best discussion. In this process, membership simply acts as a rubber stamp for what leadership has decided.

An active process means that resolutions come from below, not from above. This means that discussions at the regional and branch levels are not about responding to resolutions. They concern the key topics for resolutions. In an active learning process shop stewards and even workers themselves actually formulate draft resolutions which then go to representative regional meetings for debate, discussion and final approval for submission. This is a lengthy and costly process – but one through which the entire organisation learns about issues such as the impact of GEAR or globalisation or the pros and cons of having a research department in the union. Through this type of process members will see resolutions which they can understand and ultimately be able to defend to management, to the community and to fellow members.

A final note on resolutions is how the debate itself is structured at Congress.The question here is: who will speak at Congress. In a passive learning process, key leaders and officials dominate the proceedings. Many of these people use their inputs at Congress as a way of campaigning for key posts in the union. But in an active process, regions will provide a platform for a number of people from their delegation, helping them develop the confidence to speak out on key issues in a large forum. Participation in debates is also a key gender issue for most unions, as on the weighty political resolutions women are often passive observers, even where they may form the majority of members in the union.

But there is another tension in this process as well. Most delegates come to the Congress with a mandated position. What happens if in the course of the debate, the delegate is convinced that the mandated position is wrong? To make it even more complicated,

what if the delegate's new views are different from the rest of their own delegation? Is it democratic that the person has to defend the original position, even though they no longer believe it is in the best interest of workers? Do they lose their right to air their views if they no longer hold to the mandated position? Exploring different positions and even changing views is part of a learning process in Congress. However, if delegates are allowed to change their mandated positions willy-nilly, the whole idea of accountability may go out the window. These questions are not only crucial for the learning process in Congress-they speak to the notion of how democracy operates in the union. There are no simple answers.

Reports

Congress is an organisational moment where the leadership's performance is supposed to be assessed by the members. The vehicle used for this is typically reports – the President's report, the secretariat report, the financial report. But nothing can make a Congress into a passive learning event like leaders reading word for word from a fifty-page report. Participants, many of whom have been debating late into the night, can be driven into slumber and passive acceptance of the leader's assessment simply through fatigue. At times extensive reporting is an attempt to be transparent and make every last detail know to members. But on other occasions taking up lots of time with reports is simply a way to duck the issues by making sure there is not enough time left for delegates to raise key questions.

A far more active learning process can be encouraged through the circulation of reports in advance and the preparation of short summaries which are then presented to Congress. This leaves ample time for discussion and debate of key issues and puts the burden of actually reading and discussing reports where it should be – at the level of the membership and worker leaders.

This approach is particularly true for financial reports. Lengthy presentations of graphs and detailing of every expenditure of the union will not help delegates understand whether the union is in the red or drowning in cash. With the rise of union investment companies, the presentation of accessible financial data has become even more important. But also, finance is not only about the details of expenditure and income. How money is spent and collected reflects the priorities and programmes of the union. These issues are far more important topics of debate for Congress than whether head office should buy another printer.

Passive and active learning: Striking the correct balance

A Congress is not a workshop. The President is not going to organise the regions into a role play or simulation exercise. But there is a

learning process in the Congress which can be organised so as to promote participation and development of members. Promoting active learning in Congress can take many forms: pre-conference debates and discussion, "ice breakers" at the beginning of a day where delegates can raise expectations from the Congress, or by simply ensuring that debate is encouraged and allocated time within the Congress. Inevitably in a Congress there will be inputs: reports, speeches from Guests, motivation of resolutions. Equally inevitably there will be moments where participants will dominate: singing of songs, debating late into the night on key issues, caucusing for elections. But if trade union educators and leaders within the union begin to see the need to strike a balance between passive and active learning in a Congress, the impact of this learning event in building democracy and contributing to the overall strength of the union will increase dramatically. ◀

SECTION 2
THE PRACTISE OF TRADE UNION EDUCATION

Where are the khokies? How to plan a workshop (and not forget the khokies)

You are sitting in a meeting room somewhere. It is 9:30 a.m. on day one of your workshop. The agreed starting time is 9:00. You are expecting 25 participants but only three have arrived so far. Of the three who are there, two have already told you they have to leave at lunch to attend an urgent meeting. The other one says they were only called to the workshop at the last minute because the other comrade was called away. She is not sure what the workshop is about. The hotel where you are staying has no record of someone with your surname but they will try to get you a room. Things are just not going as you planned. Welcome to the world of trade union education.

Anyone who has attempted to plan a workshop for trade unionists knows some of the above problems. They are not new issues, some can be avoided, some require a whole long list of changes in the way education is handled by unions. But as an educator, you must try to control what you can control.

Let us look at some of the key measures you can take in planning a workshop in order to minimise problems.

Clarity of aims and objectives

Firstly, you need to be clear on why you are running this workshop. Focus is important. You can't cover the LRA, Gender and globalisation in one day. Get your priorities straight. It is better to cover one topic thoroughly than run through lots of topics in a rush.

Once you have clarified your goals, you need to be sure that everyone coming to the workshop knows what it is about, who it is for, and why it is being held. To ensure such clarity you need to be sure that the appropriate structures as well as the participants themselves are fully informed of the details of the workshop.

Plan your activities

The basic rule in making a workshop plan is: everything takes longer than you think it will. There are basic time delays that you need to factor into every workshop. These are: a) you will nearly always start late on day one b) people will want to leave early on the last day. You must keep these in mind.

Given these factors, there are also some other rules of thumb:

a) organising group activities takes extra time, people may need to move to other rooms, to move chairs, to set up flip charts, etc.
b) the minimum time for almost any group work is one hour discussion and half an hour to do report backs. This is the minimum but in most cases will not be enough.

The basic rule in making a workshop plan is: everything takes longer than you think it will.

c) You need to keep time for introductions, house rules and evaluation at the end. All of these are essential but educators often forget that they take time.

Always remember the boredom factor

Anyone who has ever done trade union education has experienced nodding heads – participants falling asleep in the middle of the workshop. Sometimes people are tired-they may be overworked, maybe they spent all night in a taxi to get to the venue. But you can add or subtract to the boredom factor with a few techniques in your planning. Some key pointers are:

a) Make sure you have some variety in your workshop, especially if it lasts for more than one or two days. While bringing well known guest speakers or putting people into group discussions can be effective, by Day Four, anything can go stale. Answers become shallow, interest fades. Think of ways to achieve your goals by using other techniques: role plays, videos, drama, simulations,debates,etc. But while you seek variety, don't simply use a technique for the sake of variety. You must be sure that the technique is appropriate for the content.

b) Don't have inputs or guest lecturers right after lunch. People with full tummies need activity or they will surely doze. This is why educators call the time after lunch the "graveyard shift." Avoid a death knell in your workshop by keeping people busy after lunch.

Don't rely on guest speakers or videos to do your work for you

Guest speakers and videos can liven up a workshop but they need to be used effectively from an educational perspective. If you are bringing in a guest speaker, make sure the person is carefully briefed about what they are to talk about. A brief should be written and should include a description of the background and number of participants (including how familiar they might be with the topic to be covered by the guest speaker) , a description of the workshop and how the input fits into the plan, a detailed list of the topics to be covered, a time frame for the presentation. As a facilitator, you need to take notes while a guest is speaking and be aware of key issues which emerge from the input. While you don't want to dominate post-input discussion, you may need to give it some direction or call for clarity on issues which you think participants don't understand but may be afraid to ask about.

A video or audio cassette can be an effective supplement to other types of activities. But you need to make effective use of such resources by preparing. This means you must have seen the video or listened to the audio cassette before the workshop and thought about how it will enhance the learning by participants. It is rarely helpful to show a video and then merely move onto the next item in the programme. Either there should be a plenary discussion of issues which emerge from the video or a group activity which makes reference to the video.

Gender, gender, gender

Most trade unions are male-dominated. Even if most of the membership is women, men will typically occupy most positions of leadership. This comes with the territory of trade union education. But if we are to promote gender equity, we need to plan to combat this. There are some simple ways to promote gender equity at the planning stage. Firstly, you can impose gender quotas on who attends the workshop. In the past some unions have adopted the policy of turning away delegations from meetings if a woman was not included. Depending on your power and cleverness, there are a number tactics you can use to try to push for gender balance. But gender is not only about how many women are in a workshop. You also need to constantly monitor your workshop content for gender issues. The idea behind integrating a gender analysis into education work is that there are gender elements in every topic we do. The gender element must inform our approach to the topic. Moreover, in selecting our resources, we must ensure that materials reflect a positive approach to gender. No use trying to fight for workers' interests by using material which degrades women or uses sexist language.

Logistics

A tiny logistical item can make a whole workshop come unstuck: no khokies, an overhead projector doesn't work, someone left the video back at the office, the venue was not confirmed. These are small issues which can usually be resolved by one phone call or a few seconds labour. But when you are standing in front of a room full of people who have not been booked into the venue or whose travel allowances have not been paid, you will get very little education work done. One way to minimise logistical messes is to make a check list of all the things you will typically need for your educaiton work: from pens to name tags to workshop packs. Then before each workshop you can review your list and tick off each item to make sure it is taken care of. This may seem quite bureaucratic but when if you are in a hurry to catch a plane or taxi, it is easy to leave something behind.

Plans are not cast in stone

Above all, remember that your purpose is to achieve the educational goals – not to implement the plan of the workshop. The best laid plans often end up in the bin simply because they do not work. While we should typically try to follow workshop plans we need to be able to recognise when a few minutes extra discussion is really crucial for the group to develop. Similarly, we need to have the sense to recognise when no one is actually listening to a long input we prepared, no mattter how careful we were to make sure it would come out just perfect. It is difficult to know when to abandon a plan but the rule is: always make a plan, try to follow the plan as closely as possible, don't be a slave to the plan. ◀

Resource packs: Is bigger better?

Many workers believe a big fat resource pack is the sign of a good workshop. If you can walk away from a workshop with a 10 cm file full of articles about the working class struggle, surely some of the knowledge in all those pieces of paper must seep into your brain. Many educators seem to share this view. They want to make sure that a workshop pack is comprehensive. To be comprehensive it must include: the South African Constitution, a copy of the LRA, several articles written by Karl Marx, all the resolutions taken at the last Congress, the latest government white paper on industrial policy, and a few extracts from the South African Labour Bulletin.

Such packs are very impressive to the observer. "How was the workshop, com?" "Great comrade, look at all the readings they gave us. "

You don't give a builder a jack hammer when a screwdriver will do the job, why give workshop participants an encyclopedia?

The trouble is that knowledge does not enter the human brain as easily as water enters a sponge. Acquiring knowledge needs human labour. Part of the job of the educator is to make this required labour productive and enjoyable as possible. A first step in this process is to abandon the idea of the big fat resource pack or file. Quantity does not equal quality.

Let's then look at what makes an effective resource pack. There a number of key issues to consider. We will cover a few of them:

- the contents of the pack
- the structure of the pack
- how to make the pack accessible

We will look at these issues one by one.

The contents of the pack

There are some things that should be in every resource pack: the objectives of the workshop and the programme. These are absolutely necessary guides for participants and may also be useful to them when they have to report back.

But beyond that, we need to think very carefully about who are the users of the resource pack and how they will use these resources. Remember how much time your participants have to read and what their reading level is likely to be. These are trade unionists, not Ph.D. students or librarians. If you give them 350 pages to read, you are likely to intimidate them into reading nothing at all. What is contained in your resource pack should provide the participant with the basis to review the content of the workshop and with an opportunity to do a little extra reading. You don't give a builder a jack hammer when a screwdriver will do the job, why give workshop participants an encyclopedia?

Secondly, try to ensure that the material you include is directly relevant to the workshop content. No matter how much you may like

a speech given by Comrade Joe Foster in 1982, it has no place in a workshop pack on the LRA. Keep on the topic.

Thirdly, try to select articles which may have different points of view on a certain topic. Your pack should reflect the idea that you are encouraging critical thinking, not that you are trying to "push your line."

Fourthly, try to find out what materials your participants might already be familiar with on the topic of the workshop. In particular, you should ensure that if the union or federation has produced something on the workshop topic, that the participants are familiar with these documents. Do not assume because a resolution was passed at Congress that everyone has read it and fully understands the implications.

In a nutshell, as far as content goes, think of your resource pack as "short, sweet and to the point."

Making the resource pack worker friendly

Apart from not including too many articles, there are a number of ways to make resource packs more worker friendly. The problem is that each of these ways usually makes more work for the educator. Let's start with worker friendly measures which are fairly easy to do. These include:

a) numbering the pages of the pack for easy reference if participants have to do a reading or look at a worksheet in a workshop
b) using different coloured sheets as dividers either between the days of the workshop or between the different topics
c) including a table of contents so that users can easily find their way around
d) spending a couple of minutes in the workshop taking participants through the reading pack so that they will know what it contains, how it is structured and how its contents relate to the workshop itself
e) including the content of overhead transparencies or written inputs done by faciltiators or guest speakers

All of these are relatively easy to do and make the pack much more worker friendly. But there is much more that can be done, if you have the time and resources. For most workshops it is actually difficult to find the perfect materials. If you are dealing with political or economic issues, available articles are likely to be full of jargon which makes for difficult reading. If you are dealing with organisational or legal issues, available material is likely to be written for business, not for labour. For example, a business-oriented book on strategic planning is likely to assume goals of maximising profits and increasing productivity-hardly the aims of labour.

As an educator there are a number of ways you can compensate for the lack of appropriate materials:

a) if you have the skills and the time, you might do research and write your own materials (or hire someone with pro-labour sympathies to do it). This might prove worthwhile if you are doing a workshop which is likely to be repeated many times (e.g. shop steward training). But you must be aware that writing materials takes a lot of time to do properly. Even if you don't do the writing yourself, you will need to be very familiar with the content and the needs of the participants in order to instruct and monitor an outside writer. Still, for many unions a training manual for shop stewards, for example, can be a very good investment. Such a manual helps to promote "organisational learning" – the type of learning where knowledge and skills become part of the organisation and do not simply belong to one individual.

b) If you are not going to write your own materials you can modify or provide support for the materials that you do include in the resource pack. This can be done in a number of ways. The easiest method may be to provide a glossary with definitions of difficult terms in the readings. Another helpful but more time-consuming method is to write summaries of articles or to cut and paste excerpts of articles which are too long or too hard to read. A third method is to provide a sort of "study guide" for your reading pack. The study guide would be a description of the various articles in the resource pack and an explanation of why they were included. Such a study guide could be at the beginning of the pack or parts of the guide could be placed at the beginning of each new section.

c) You can actually re-write articles — modifying them slightly in order to make them easier to read. This might mean getting rid of difficult vocabulary, shortening sentences, and leaving out irrelevant sections. If you do this you should note in the pack that you have modified something from the original.

Lastly, there is the issue of the cover. We all know the old saying: 'don't judge a book by its cover.' But despite the warning, we still often base our opinions on first impressions. To make a resource pack more appealing, it might just be worth the time to find an appropriate photo or graphic and spend a bit of time designing a colourful and attractive cover. If you can't do it, look for someone around with those skills.

The structure of the pack

Structure depends on your needs. Every structure has its strengths and weaknesses. Spiral binding is very strong and holds the paper together very well. Your workshop participants are unlikely to lose any of those papers. But the problem with a spiral binder is that you can't add anything later. Sometimes it is important not to circulate readings or worksheets before the actual exercise. For example, suppose you are doing a workshop on GEAR and you want to begin your

workshop by asking the participants what they know about the GEAR. If you've given the participants a summary of GEAR in their workshop pack, they may just read through it quickly and then give their answers. But you wanted to get their knowledge and understanding of GEAR not that of the resource pack. On the other hand, if you've had a discussion of the GEAR, handing out a summary of the GEAR afterwards may be a good way to remind the participants of the key points of the discussion.

The other common structure for resource packs is ring binders. These are ideal for adding things later. So for example, if you are running a series of workshops you can keep adding material for each new workshop. The problem is hanging onto the papers. The holes used for ring binders often get torn and then some of the papers fall out of the ring binder. Ring binders are also awkward to carry. You can't roll them up and put them inside a bag or a jacket pocket. If your participants are likely to use the materials for reference in an office, the ring binder could be ideal. But if they are organisers who constantly move about with the materials, the spiral binder may be more effective.

A third option is to combine a spiral binder with a pocket file. The pocket file can then hold loose papers or separate publications which are not part of the initial resource pack.

Conclusion

Many educators give little thought to what they put in a resource pack. But the pack is a permanent legacy of your workshop. By choosing your material carefully, packaging it creatively and supporting it appropriately, you can provide participants with a resource that they can use many times over in the future. If you choose to simply slap something together on the spur of the moment, you might produce a very impressive curio of the workshop but the actual content may end up being little more than scrap paper for participants' children to draw on. ◀

Audio visual aids: a replacement for facilitating?

With a video, participants can almost experience what is happening and has a closer connection with the people being interviewed in the video.

Educators often believe that audio visuals are the best educational tool for keeping the interest of the participants. They often believe that it is better than presentations, which are considered boring. However, if audio visual aids are not used correctly, they could be completely boring and render the session educationally useless.

Yes, it is true that audio visual aids can make a workshop session more interesting, yes it can often be "better" than a presentation, yes it can capture the interest of participants, but the use of audio visual aids do have their own problems and limitations. Not least of which is being able to find suitable material which deals with the topic of the session.

Why are audio-visual aids useful?

The use of video (when one can find the correct one) can eliminate the boredom of lecture-style presentations. They provide participants with the content of the topic as well as visual connections and associations of the topic.

For example, a video on the impact of export processing zones could include interviews with people working in such zones as well as footage of the actual conditions that workers work under. This provides a more intimate connection with the conditions than if a facilitator tries to describe these in a lecture-style presentation with overheads. It is also more intimate than a reading text with structured questions.

With a video, participants can almost experience what is happening and has a closer connection with the people being interviewed in the video. It could bring a real experience from another part of the world closer to the learners. It allows participants to hear first hand what is being said and not, as in the case of a presentation, hear the story via a second person.

A video of a speech or an address at an organisational congress could also be used in a learning environment where participants could hear what has been said from the speaker and not an account of what has been said by someone else – the facilitator or someone who has attended the congress.

Let's look at what are the difficulties surrounding the use of audio visual aids as education techniques. We will look at the following points:

- The difficulty of producing materials to suit your needs
- Finding the correct materials for the topic of the session
- Some ways of using the materials correctly and effectively given the difficulties

The difficulty of producing materials

The most commonly used form of audio visual education tool is the video. This medium however, is very difficult and costly to produce. In many cases, animated (drawings) characters are used. This is sometimes less interesting than using real live people, but it could be used in certain instances like graphs, charts, etc. However, when the topic of the session is globalisation, it becomes less useful to use animation, and it would be more useful to use worker's voices, activities and real live situations. This takes very long to produce and is very costly.

A not small problem, is the expertise and ability to produce a video. If one wants to produce a video covering actions of international solidarity between workers in different countries, it would involve lots of time, travel and money to secure the video footage, after which, the process of editing and finally producing that 20 minute video demands additional time, money and expertise.

So, one of the greatest limitations on audio visual materials is the difficulty in production.

However, this problem is not insurmountable. There is the possibility for facilitators to set up a situation, where the presentation of a guest speaker on a topic could be video taped. This could be shown at later workshops without having to invite the guest speaker again or the facilitator trying to capture what the guest speaker has said. This could even be a video clip of a speech on television or of an opening address at a union or federation congress.

Finding the right material for the session

In the absence of being able to produce audio visual materials for workshops, there is a range of already produced video material that can be used. However, it is not always easy to find the most suitable material for a particular session.

One of the most common criticisms of video material that is heard, relates to the absence of South Africa specific material. Most of the videos produced on the topic of globalisation is either European or North American (US or Canada). Very little has been produced on specifically the countries or regions of the south and even less on Africa specific. Even those that do relate to countries of the south, often do not deal with the specific topic for which you want to discuss. This poses difficulties in choosing the right video with the right topic for the right session.

One may find a very effective video dealing with women's issues, however, it may not be effective for a session on women and globalisation. Alternatively, one may find a very effective video on

workplace restructuring, but it may focus on a different sector or industry than the focus of the workshop.

There are ways of circumventing this problem, however, these are not always very effective and useful. There is a fine line between choosing the best possible available material and making it work effectively. In the next session we will look at how one may go about trying to overcome some of the problems.

Choosing the right video

Balancing methods and techniques for a workshop on globalisation of two days or more is not an easy task. There is a wealth of information on the topic, but these are mostly in the written form. It is not easy to find one article that serves your needs. Choosing the technique depends on what resources are available.

Once you have identified the aims and objectives of the workshop, the next step is to find the materials and resources you will use to provide the best possible combination of information to the particpants (of course not forgetting that the participants themselves are a rich source of information).

It is always useful to identify which audio visual material is available on the subject, then identify which of those are suitable for the workshop itself. The next step is to view the video with the aim of identifying which aspects of it is most useful and which is information that may not be relevant for the workshop.

Facilitators should remember that viewing a video in a workshop is not for pleasure, but that through that, a learning process must evolve. It is therefore Important to realise that including a video session is not for the purpose of varying the method of teaching, but that it's main function is educational. It should be chosen as the most suitable education method for the session. The decision to use a video should not be made before one is sure that the use of the video is the best educational method. The facilitator must know the content of the video and be able to see how discussion around the information can be useful.

Secondly, it is important to remember that viewing the video is no different from other activities. It is not useful to show a video and then leave matters there. The facilitator should structure key questions arising out of the video. The video can be stopped, rewound and short discussions can be allowed during viewing for participants to understand it.

One useful way of solving the problem of videos being European or North American based, is to structure questions in such a way that participants can identify what aspects of the video applies to their

situation in South Africa. This can also be useful if the video focuses on an industry which is different from the participants' industry.

Another way of dealing with these problems is to give an input before or after the video. One way or the other, it is always useful for facilitators to present a summary of the materials used including a summary of the discussions that ensued. It is always useful to make the links between the video and the discussions and remind participants of what took place in the activity.

Some things never to do when choosing a video as a method of education

Never choose a video for the sake of it. If you cannot find a suitable video for the topic, use another method like a reading group with questions.

Never use a video which vaguely relates to the topic. If the topic is globalisation and women, do not use a video on violence against women.

Never show a video which you (as the facilitator) have not viewed and understood. If you cannot understand it, the participants will not understand it.

Never show a video and leave it there. Structure questions relating to the topic of the session. Inform participants before the video what are the questions to assist them to look out for the relevant issues.

Never use a long boring video. If the video is too long, try to fast forward those parts that are not relevant to the topic of the session. ◀

Small groups, flip charts and worker education

The most important component of group work is to make sure that you give the participants clear questions or tasks which can be done effectively in the time allocated.

There is a standard format which has a long tradition in workshops – people go into small groups, discuss certain questions, write up their answers on flip charts and report back to plenary. For many educators, this is a formula for organising a workshop. Clearly this formula has serious limitations and worker educators need to also find ways of using other techniques – role plays, simulation exercises, drama, poetry, music, debates, individual work – in order to ensure that their education does not become boring.

But despite the need for variety, nearly all of us will continue to make use of small group work with report backs. For despite its shortcomings, small group work has the potential to create a dynamic debate and discussion driven by participants. These discussions can often enable workers to tackle issues with a seriousness and complexity that cannot be achieved as successfully by other methods. However, to ensure that small group work is effective, there are a number of guidelines which should be applied. Here we will discuss a few of them.

Clear, useful and uncomplicated questions or tasks

The most important component of group work is to make sure that you give the participants clear questions or tasks which can be done effectively in the time allocated. Some of the most common mistakes we make in this regard are:

a) asking questions which can simply be answered "yes" or "no" when you want people to explain. For example, "Do you agree with the view that GEAR is anti-working class?" If as a facilitator you want participants to look at the content of GEAR , this question will not do the trick. The participants could simply answer "yes" or "no" and have completed the task. Other ways of asking the same question might be:
   - Is GEAR anti-working class? Briefly explain your answer. OR
   - Are there aspects of GEAR which are anti-working class? Briefly explain your answer. OR
   - Make a brief presentation to the group on the following topic: "GEAR is an anti-working class economic policy."

b) asking questions which are biased, thereby undermining the opportunity for the participants to critically assess for themselves. For example, if you ask: Why is GEAR an anti-working class economic policy?, you have already decided the viewpoint that the participants must take. In the interests of building the capacity of participants to develop their own critical views, questions must give them the opportunity to disagree with the views of the facilitator or even the organisation. This does not mean

promoting disunity but ensures that an open culture of democratic debate will be promoted. Remember a workshop is not a decision-making structure: a consensus or a final conclusion is not required. What is needed is a healthy examination of the issues which are considered in the workshop.

c) Asking too many questions
Generally four or five questions will be enough for small group work. It is better to have groups discuss a few questions in depth than to get a lot of very short, shallow answers to a range of questions.

d) Focus the questions on a doable task
Don't ask a group to re-write the South African Constitution or the LRA in twenty minutes. You can also limit and focus your questions by specifying quantities. For example, if you ask, "How does globalisation affect the lives of workers?" you are likely to get a very long shopping list of the effects. Participants may think that their task is to come up with as many effects as possible. However, if you ask, "What are the three most important ways in which globalisation affects the lives of workers?" you will get a much shorter list. Furthermore, asking the question in this way forces the participants to critically analyse which of the effects are more important rather than simply listing them.

Apart from thinking carefully about our questions there are other things to remember in small groups:

Avoid having many groups giving exactly the same report backs.

If you have eight groups answering the same five questions, the report back will be very long and repetitive. By the end, most people will have forgotten what the first group said about anything. There are ways to reduce time and repetition. One method is to have only one or two groups, give their answer to each question and then allow anyone else to respond or critique. Probably the worst blunder to make is to have eight groups and only allow four to report back and then tell the other four that because of time we cannot entertain their report backs. This means that they did their work for nothing. No matter how you re-structure your group report backs, try to ensure that every group at least has some chance to present to plenary, even if it is short.

Don't be wedded to the use of flip charts

Flip charts are useful because they are a concrete product of a group's work and can be referred to later on in the workshop. But flip charts are not always required and sometimes can be distracting. Many times flip charts are not written clearly and even the presenters cannot read what is on the chart. Also, if each group has filled up three or four flip charts, it sometimes becomes very time consuming and awkward to accommodate all these pieces of paper. You end up

having the walls so covered with flip charts that you can't find space to do your other activities. Lastly, some people simply read from the flip chart without actually thinking about what they are saying. Sometimes the flip chart helps those participants who lack confidence to feel secure. But other times people mechanically read from a flip chart when they could make a much better oral presentation from their head or from notes. You need to think carefully about whether the report backs for you group work should include flip charts. There are other alternatives for report backs which sometimes can be far more dynamic than flip charts: drama, interactive report backs, collective or group oral report backs.

Think carefully about how group work can be used to promote participation

Small groups themselves often provide a platform for participants who may not feel confident enough to speak in plenary. But in order to use group work to enhance participation, you need to be careful about how you divide up people and what guidelines you give them for report backs. Gender dynamics may warrant particular attention in this regard. If women are a minority in a workshop, their participation may be enhanced by requiring gender balance in report backs (e.g. each group could be required to have a pair of people reporting back – one male and one female). Another method, which is often controversial, is to put all the women into one group. Sometimes this serves to free up space for the women to talk, but in other instances it may marginalise female participants. Careful judgment is required on this issue.

But overall small groups can enhance participation if you keep the groups relatively small (six people or less) and if you try to ensure that the same people do not always give the report backs. A simple guideline to groups which says that no one who has previously given a report back will be allowed to repeat may solve this problem.

No doubt we will continue to use small group discussion in our workshops and courses. If we follow some or all of the above guidelines, hopefully these small groups can be dynamic and build the capacity of participants to do more than simply fill up a flip chart full of lots of words that none of the other participants can read or understand. ◀

Trade union education: How do we break the mould?

Introduction – our stale old format

Over the years, workshops in trade unions have developed a certain format. Typically we as facilitators begin with an input on the topic. Alternatively, if we don't know the topic well, we bring in an "expert." After the input we count off by threes or fours and people go into groups to discuss some questions. The groups write down their answers on a flip chart and report back to the plenary. In many instances, such an approach has yielded useful debates and provided many workers with opportunities to air their view on important issues. But perhaps just as often this formula has produced repetitive report backs and scribbled flip charts which most participants cannot actually read or understand. These shortcomings of our stale old format have led many educators to seek new techniques, new approaches to discussing issues.

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Some "new" techniques: Role plays and simulations

Two of the most popular techniques to stimulate interest are role plays and simulations. In a role play, participants act out roles. In a simulation, a fictitious context is created. It could be a country, a trade union, even a family. Often role plays and simulations are combined – so participants have to act out roles as if they were citizens of "Sunshine City" or members of the "Combined Food and Allied Workers Union". Role plays and simulations have considerable strengths as educational techniques:

i) both draw on workers' experience as opposed to the knowledge of outside experts
ii) both usually have a humourous angle and often are very enjoyable to participants
iii) both may provide an opportunity for participants to raise issues or points in a way that they may not feel free to do in a more formal discussion
iv) both provide opportunities for participation by workers who might be shy to make comments in a more formal discussion

The real beauty of these methods is that at the end of a well-designed role play or simulation, everyone generally feels very happy – they have enjoyed an educational experience – something which may never have previously happened to them during all their years in school or other training courses. The sheer enjoyment of learning is a big plus because it motivates people to continue learning, to continue taking part in the trade union's education programmes, and to encourage others to also participate. Unfortunately, many educators give no weight to such outcomes. They still think that workshops are simply opportunities to indoctrinate participants. But in the end, we want trade unionists to be convinced that worker education is a far cry from Bantu education or listening to a preacher's sermon.

The "new" techniques – some warning notes

Despite all the positive aspects of role plays and simulations, educators must use these techniques strategically. Not all topics or situations are appropriate for such activities or techniques. In many cases role plays or simulations may need to be combined with other techniques in order to effectively address an issue.

Let us look at two common topics for workshops in a union: a course on negotiating skills and a course on the Basic Conditions of Employment Act. In considering our techniques for these two workshops, we need to look at the role that workers' experience and "expert" input should play in these two topic areas. Most leaders will have some experience of negotiating skills. Therefore, the logical starting point of a workshop on negotiating skills is to build on the workers experience. In many instances this could be done through a variety of participatory methods like role plays and simulations. From these activities, many lessons on successful and failed negotiations could be drawn. Drawing almost entirely on the workers' experience and making use of that experience through educational activities, it is quite likely we could come up with a fairly complete set of suggestions and key points for negotiations.

On the other hand, education around the BCEA focuses on a specific body of technical knowledge – the content of the Act. Despite workers' familiarity with some of the issues related to employment conditions, all the tapping of workers' experience in the world will not draw out the contents of the Act. Moreover, unlike with negotiating skills, there are absolute rights and wrongs about the contents of the Act. While people may agree to disagree about how to prepare for negotiations, they cannot agree to disagree about the how long the work week is according to the law. In carrying out education work on issues like legislation or policy, it is essential that the details of the documents be presented. This is particularly important when the law or policy is relatively new and most people have not had time to familiarise themselves with it or make use of it in practice. In this case, the key skill of the educator will be find a way to summarise the contents of the document in a way that is accessible to workers while enabling them to critically assess the law or policy. In most cases, this will be most effectively done by a well-planned input and discussion. While we don't want all our education work to be input driven, we must not totally reject inputs simply because they are not activity or do not focus on workers' experience. Like role plays and simulations, inputs have an important part to play in worker education.

However, after a focused and dynamic input, the participants' knowledge and understanding may be deepened by a number of educational techniques, including role plays and simulations. For example, a role play of a CCMA case involving the Basic Conditions

of Employment Act may be a good way of testing participants' knowledge in an active way. Alternatively groups could be given a case study to which the Act must be applied and then debate their points of view on the case. The educational point is that with issues like legislation and policy, role plays and simulations cannot substitute for an input which forces participants to engage with the precise contents of the document.

A second cautionary note about role plays and simulations: by not engaging with the details of reality, activities like simulations may serve to block a more detailed discussion or debate around a key issue. By placing a situation in an imaginary country in an imaginary trade union, the distance from the reality may block participants from raising key issues. Also, at times participants may become confused as to whether the situation is real or fictional. So, for example, if a simulation is attempting to promote discussion on economic policy, it may not be useful to set the activity in another country. If the object is to discuss GEAR, then an abstraction may deflect the discussion from the key issue. One possible way to remedy this shortcoming is to have a structured discussion of the real economic policy after the simulation exercise, using the activity as a stimulus for raising key points.

A third cautionary note about these activities is that they involve a lot of planning and preparation. Typically participants have to be given lots of material and the details of situations must be thought through very carefully in order to avoid confusing the participants or mis-directing the exercise. Don't think that role plays and simulations are time-savers in planning workshops. Most simulations will take a long time to plan properly – often far more time than it takes to plan commissions or even to prepare an input.

A final question: Will learning always be fun?

It is important that we move away from the stale old input-commission-report back mode and try new things. It is also crucial that we find ways that learners can enjoy themselves during educational events. However, if we reflect on our own learning experience, not all of it was fun and games. At times we learned the most by hard work and serious reflection, at other times we learned through collective action in our organisations, and at other times we learned through working with other people in enjoyable activities. As educators we need to remember that our participants can't always have fun but they must not always feel like they will have their nose to the grindstone when they come to our workshops. Ultimately our workshops are not about providing laughs or cracking the whip. Our task is to use a variety of appropriate techniques which will help us to build the power of our participants to strengthen the organised working class. ◀

Do our workshops make a difference? Evaluating trade union education

Trade union workshops are not like a driving test or matric maths. There is no pass or fail. Maybe the participants learnt something, maybe they didn't. Maybe they enjoyed the lunch more than the workshop, maybe they didn't like the lunch at all. Everyone says that as educators we must evaluate and measure our impact but few of us are able to do this effectively. Usually we have to just run to the next workshop or meeting before we have time to think about the last one.

So, we do need to evaluate, but how? The starting point in any workshop evaluation is the aims and objectives of the workshop. If you are to measure your success, you need to start by seeing if you achieved what you set out to do. That is the starting point, the question is how to measure.

There are two very common ways of doing evaluation: plenary discussion and evaluation forms. These represent the minimum programme. In a plenary discussion, you can simply ask participants directly if the aims and objectives have been met. The problem is that workers are generally quite polite when it comes to such matters. They will almost always answer positively (even if they may have their doubts). Besides there is a conflict of interests: if they criticise too loudly they may not get invited to the next workshop!

You can partially avoid this problem by using evaluation forms. At the end of the workshop you can circulate a questionnaire with a few or many questions on it about the workshop. Such forms give you a broad barometer but not much by way of specifics. Despite the confidentiality, workers are often just as polite on forms as they are in the plenary. Moreover, usually participants are in a hurry at the end of the workshop – they don't want to write long comments-they've got a taxi to catch or some cellphone messages to return. But evaluations forms are very useful for two reasons. Firstly, they provide you with a written record of what the participants said. Later on if someone tries to say that there were "a lot of complaints" about the workshop, you have got some pieces of paper to wield in your defence. If you are controversial, you may need these papers. More importantly, though, occasionally you get some useful comments. It is especially critical to realise that if more than one or two people give you negative feedback on the same point, it is likely that there is a problem you need to address.

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Plenary discussions and evaluation forms also serve another role in the workshop process: they are symbols of democracy and openness. By providing participants with an opportunity to comment you are empowering them to speak and indicating that you value their views. Therefore, just in terms of democratic process, some type of evaluation opportunity is important.

But democratic opportunity is not the same as concrete feedback on the impact of what you have done. You may have to be more creative and persistent to get that type of feedback. So what to do?

Firstly, you need to be both an educator and an evaluator of your own work. This is particularly important if you are running a course or programme more than once. It is crucial to record and observe your own work. Write down notes during the workshop – either during the session or afterwards. The more education work you do, the more you should develop a sense of whether or not things are working well. The problem is that if you run a workshop this week and then come back to it two weeks later, you are unlikely to remember whether participants found a certain reading difficult, if a particular activity took too long, or if large numbers of participants were snoring during one of your inputs.

So it is very important to take notes and to make a habit of going back to them afterwards. This form of self-evaluation can be particularly effective if you are working with one or more other educators. In that case it is often useful to get together soon after the workshop and evaluate. Any attempt at comprehensive evaluation should include all aspects of the workshop: planning, resource packs, activities, facilitation, logistics. To assist in this process it may be useful to select a team of participants to be evaluators or process observers. These individuals can have the task both of assessing the progress of the workshop and talking informally to participants to get their views. If process observers are known to participants, they may be able to get more honest comments than those which go directly to the facilitator.

A last method of evaluation during the workshop is small group evaluations. You can put participants into pairs or small groups and ask them to answer a few questions about the workshop. Using groups can help people overcome shyness about making critical comments.

So far we have focused on trying to pry critical comments out of participants. As an educator, you want to get as many suggestions as possible about how to improve your work. But do not forget about the positive. We have run many workshops which went well. In these cases it was often important to give participants an opportunity to say how much they learned in the workshop and how they felt ready now to take on the bosses. On more than one occasion, we have asked each participant individually to say what they liked best and least about the workshop. By the time we were half way around the room, the group was alight with inspiration and determination to take the union struggle forward. So extracting the negative is not the only key aspect of evaluating.

Post workshop evaluation: The followup

So far we looked at evaluating during the workshop. In reality much of the impact of education work takes place after the workshop has finished. While it is wonderful to feel inspired by a workshop, it is

often a different thing entirely to transfer what you have learned in a workshop to the daily practice of the trade union. To evaluate your education work in this way, you will need to do a followup. Deciding on the appropriate type of followup depends largely on the content of the workshop. If you have trained finance officers on financial controls , you could include in your curriculum periodic visits to their offices after the workshop to see what systems have been put in place and how they are functioning. This type of on-site visit may be essential for hard skills. Similarly if you are training paralegals in the LRA, it may be useful to sit in on a CCMA hearing where your workshop participants are representing workers.

More difficult to evaluate is content areas which are in the jargon of education: "affective". Many of the objectives of workshops may be things like "empowering workers to participate in economic debates", "building the self-confidence of women shop stewards", or "promoting an understanding of working class struggle." Yet empowerment, self-confidence, and understanding are very difficult to measure. It is possible, nonetheless, to contact participants a few weeks after a workshop and see if the content has been useful to them in their work. This may be useful but is far from flawless and many people will simply give a positive answer just to avoid rocking the boat.

Another easy way to measure the impact of such courses is simply whether participants concretise a desire for further education on this area. In most cases, if workshop participants go back to the educator and ask for more education on that area, they have evaluated the workshop as a success. There have been cases where workshop participants phoned months after a workshop and asked for more readings on the topic. One workshop participant even said that his wife thought that he was given some magic potion because he seemed to be spending so much time reading the materials sent to him. We can safely say that that workshop had a successful outcome for him!

So, ultimately, there is no single, sure-fire way to evaluate your workshops and be sure of getting an accurate assessment. There are evaluation tools like questionnaires which may be helpful. Followups can also be useful. In some cases you may even have assignments, projects or essays. But even with all these tools, probably the most effective tool of evaluation is opening lines of communication. If you are able to communicate with participants and they feel free to speak with you, you will get the most important evaluations of all-the honest views of the workers who are in the workshops. ◀