



International  
Labour  
Organization

# Educating for Union Strength

ILO ACTRAV Handbook on  
Educating Trade Union Educators

ACTRAV  
Bureau  
for Workers'  
Activities



# **Educating for Union Strength**

**ILO ACTRAV Handbook on  
Educating Trade Union Educators**

Copyright © International Labour Organization 2015

First published 2015

Publications of the International Labour Office enjoy copyright under Protocol 2 of the Universal Copyright Convention. Nevertheless, short excerpts from them may be reproduced without authorization, on condition that the source is indicated. For rights of reproduction or translation, application should be made to ILO Publications (Rights and Permissions), International Labour Office, CH-1211 Geneva 22, Switzerland, or by email: [pubdroit@ilo.org](mailto:pubdroit@ilo.org). The International Labour Office welcomes such applications.

Libraries, institutions and other users registered with reproduction rights organizations may make copies in accordance with the licences issued to them for this purpose. Visit [www.ifro.org](http://www.ifro.org) to find the reproduction rights organization in your country.

---

*Educating for Union Strength: ILO ACTRAV Handbook on Educating Trade Union Educators*

978-92-2-129823-6 (print)

978-92-2-129824-3 (web pdf)

International Labour Office Bureau for Workers' Activities.

educational planning / trade union role / training of trainers / workers education teaching aid

06.02

*ILO Cataloguing in Publication Data*

---

The designations employed in ILO publications, which are in conformity with United Nations practice, and the presentation of material therein do not imply the expression of any opinion whatsoever on the part of the International Labour Office concerning the legal status of any country, area or territory or of its authorities, or concerning the delimitation of its frontiers.

The responsibility for opinions expressed in signed articles, studies and other contributions rests solely with their authors, and publication does not constitute an endorsement by the International Labour Office of the opinions expressed in them.

Reference to names of firms and commercial products and processes does not imply their endorsement by the International Labour Office, and any failure to mention a particular firm, commercial product or process is not a sign of disapproval.

ILO publications and electronic products can be obtained through major booksellers or ILO local offices in many countries, or direct from ILO Publications, International Labour Office, CH-1211 Geneva 22, Switzerland. Catalogues or lists of new publications are available free of charge from the above address, or by email: [pubvente@ilo.org](mailto:pubvente@ilo.org)

Visit our website: [www.ilo.org/publns](http://www.ilo.org/publns)

---

Design and printing by the International Training Centre of the ILO, Turin – Italy

## Foreword

In today's world of work, globalization has weakened the organizing strength of trade unions and the education programmes that were an integral component of union action plans are a victim of this process.

Outsourcing, flexible work, the loss of permanent jobs and the increase in short term contracts have meant lower wages, worsening conditions and insecurity. There has been a dramatic increase in the number of workers in the informal economy, where workers have no rights to organize and are not protected by labour laws.

This situation has impacted on workers ability to organize and educate because union membership and resources have been reduced. The design of workplaces, where employers are not always visible, makes it difficult to apply for trade union education leave and workers who already work long hours have to take leave days to attend education activities.

Lack of access to education means there is no opportunity to gain the skills and knowledge needed to organize and represent workers in the complex world of today's industrial relations systems and laws. Train the trainer courses are available but tend to focus on issues rather than the skills to educate; this in turn weakens the effectiveness of union education.

This handbook is intended to bring union education programmes back onto the agenda. It emphasizes the importance of training educators and focuses on 'educating the union educator' to implement education activities that are learner focused and based on the principles of solidarity and collectivism. It recognizes that education is a vital part of a union strategy and action plans because it encourages the involvement and confidence of workers to play a role in the union strengthening negotiations, representation and campaigns.

It recognizes that all unions are different and sets out a modular approach, from which unions can select and build courses to suit the needs and specific situations of the country or sector. It provides many examples for education with active exercises and approaches, as well providing a justification for developing and strengthening education programmes.

Unions are encouraged to seek ratification of ILO Paid Educational Leave Convention, 1974 (No.140), which promotes the goal of lifelong learning and recognizes the area of trade union education. This can be negotiated into collective agreements and national industry award, as part of the process of seeking ratification.

The importance of mainstreaming gender equality into all education programmes, strategies and methods is emphasized throughout as part of a methodology that promotes union values and principles.

In October 2007, the ILO held an International Worker' Symposium on *The Role of Trade Unions in Workers Education: The key to trade union capacity building*. Union representatives, from around the world, evaluated workers education activities, identified needs at the different levels and examined the role of labour education.

The representatives developed separate recommendations for trade unions, the ILO, governments and employers that cover a broad range of initiatives and recognize that all ILO constituents should play a role in strengthening labour education because union education and capacity building are vital in furthering the ILO goals of social dialogue and Decent Work for All.

The recommendations of the Symposium specifically requested the ILO Bureau for Workers Activities (ACTRAV) to 'contribute to the development of a baseline for labour education' and to organize regional and national initiatives in the field of labour education to further strengthen national and international labour organization objectives'.

This Handbook is part of an ILO Asia Regional project that aims to fulfil this recommendation by contributing to the strengthening of national centre and union education programmes through the training of education officer who can use participatory and active learning methods, drive education policy and manage education programmes.

During the 1980s and 1990s the Australian Trade Union Training Authority (TUTA) conducted annual residential courses, funded by ILO ACTRAV for union leaders and educators in the Asia and Pacific region. These courses used a learner centred methodology focusing on 'education for change'. The courses played a major role in strengthening union structures, representation and education programmes but could not be continued after the Australian Government abolished TUTA in 1996.

The Asia regional project aims to reintroduce this type of approach and, to this end, includes the organization of regional and sub-regional educator training courses that are developing a core of trained educators who can conduct national educator training programmes on a regular basis. The Handbook has been guided by the outcomes of these courses.

Although developed as part of an ILO Asian regional project, the handbook, is relevant for unions all over the world, whether from industrialized, industrializing or non-industrialized countries.

It recognizes that this approach to union education is not new but has been developed over many years, by many union educators from all regions of the world. The Handbook attempts to draw from these and articulate a unique trade union education methodology to empower and strengthen union activism.

**Maria Helena Andre,**  
Director ILO-ACTRAV,  
Geneva  
2015

# Contents

Foreword..... iii  
Acknowledgements ..... vi



## > Part One

### Introduction

- A. About the Handbook
- B. Educating for strength
- C. Educating for equality



## > Part Two

### The training modules

- Module One: Basic training for educators
- Module Two: Advanced course for educators
- Module Three: Designing and managing a union education programme



## > Part Three

### Additional materials

- Section 1: Alternative course designs
- Section 2: Ideas for exercises
- Section 3: Further reading and sources

# Acknowledgements

This Handbook is the result of valued contributions from;

- ➔ **Jenny Luck, the external collaborator** who compiled and wrote the Handbook and conducted the pilot workshops to test the materials;
- ➔ **Raghwan**, the ILO ACTRAV Desk Officer for Asia and the Pacific Region who commissioned the Handbook, contributed to the terms of reference and the regional pilot workshop with ideas and support
- ➔ **Christine Nathan**, former ILO Regional Specialist in Workers Education for Asia and Pacific, who supported the writing of the Handbook and coordinated and contributed to the pilot workshops
- ➔ **Ariel B Castro**, former ILO Senior Specialist for Workers Activities for South Asia and now, Senior Programme Office for Asia and Pacific, ACTRAV-Turin who assisted to facilitate two pilot workshops and contributed to the testing and finalization of materials
- ➔ **Susamma Varghese**, former ILO ACTRAV, National Project Manager for India, who assisted with the regional pilot workshop and contributed to the Gender Equality section of the Handbook
- ➔ **Narayan Bhattarai**, ILO ACTRAV National Project Manager for Nepal who organised and contributed to the sub regional pilot workshops in Nepal
- ➔ **The union educators who attended the regional and sub-regional educator pilot workshops** in Bangkok (December 2012) & Nepal (June 2013) whose active and committed participation enriched and helped make it relevant to the region
- ➔ **The Australian Council of Trade Unions (ACTU), Organising Centre & Education Department**, for providing Jenny Luck with technical support, materials, the design of communication model in Module 1 and for generously sharing ideas and experiences



Jenny Luck acknowledges the following trade union educators and organisations that played a major role in developing this approach over a number of years

- **The union educators and representatives attending the ACTU Trans-Tasman Union Educators Conference** in Melbourne, 17 October 2012 who shared new approaches to union education
- **The 1989 – 1996 team of education officers from Clyde Cameron College, TUTA, Australia** who contributed to the methodological approaches that form the basis of this Handbook
- **Michael Newman**, who designed and conducted the original educators courses used in this Handbook and who inspired and motivated a generation of union educators in Australia
- **The regional, sub regional and national education and project coordinators in Public Services International and BWI** (1996 – 2011) in Africa, Asia and the Middle East who influenced and adopted the methodological approach in development project education activities.
- **The COSATU Education Officers (South Africa)** who integrated democratic participation and a working class ideology into union education methodology
- **Linda Cooper, Senior Lecturer and Associate Professor for Adult and Workers Education at the University of Cape Town, South Africa** who collaborated with Jenny Luck on the Ditsela Trade Union Educators Diploma Course, providing fresh ideas and approaches
- **All the union educators and learners who have worked with Jenny Luck over the last 30 years**



# Part 1

## INTRODUCTION



- A.** About the Handbook
- B.** Educating for strength
- C.** Educating for equality





# > Part One > contents

Introduction

■ <b>A. About the Handbook</b> .....	1
Purpose and rationale .....	1
Description .....	4
Using the Handbook .....	7
Definitions of key words.....	12
■ <b>B. Educating for strength</b> .....	14
In solidarity and unity .....	14
Union education as part of union strategy .....	15
The role of union education in providing knowledge and skills.....	17
The role of union education in involving workers and members.....	19
The role of union education in promoting campaigning in the world of today .....	21
The role of union education in making unions relevant and accessible ....	23
The union educator .....	25
The international framework .....	27
■ <b>C. Educating for equality</b> .....	29
Union education in support of gender equality.....	30
Defining gender equality .....	31
Integrating gender equality .....	33
A gender equality exercise .....	37
A sample sexual harassment and discrimination course statement.....	38



## A. About the Handbook

### CONTENTS:

- ▶ The purpose and rationale of the Handbook
- ▶ A description
- ▶ Using the Handbook
- ▶ Definitions of key words

### ■ Purpose and rationale

This Handbook is intended to provide trade union organizations with a comprehensive approach to **'educating union educators'** and **'using education to strengthen the union'**.

*There are many terms to describe education in the labour movement. This Handbook uses the term 'union education'*

### The purpose of the Handbook

#### Reinforce the use of education to:

- ➔ Raise political consciousness and build activism
- ➔ Develop the skills and knowledge to better represent members and mobilize for campaigns.

Education has proved to be a good organizing tool, which can strengthen union action, prevent violations and build the capacity of the union.

It can change people's lives.

Rosa Parks did not decide on the spur of the moment to violate racial segregation laws on 1 December 1955 in Montgomery, Alabama, United States. Many factors influenced her decision to refuse the order of the bus driver to give up her seat in the coloured section of the bus to a white passenger

One contributing factor was the type of education Rosa had received at the Highlander Folk School in Tennessee, where Myles Horton, a radical educator, had conducted activities for the labour and civil rights movements. She recognized that her rights were being infringed and this empowered her to take the step that led to the Montgomery bus boycott and made her an icon of the civil rights struggle.

## Union education empowers and motivates union members and representatives to take action.

### *In order to do this, union educators need:*

- Specific knowledge and skills to design and deliver activities that motivate people
- An insight into the political and theoretical context so that they can use these skills and knowledge effectively.

The focus of modern forms of communication tends to be on 'headlines', rather than on detailed information. Education, in general, also seems to be moving in this direction. As a consequence, people are often unaware of the context or reason behind events or trends.

Myles Horton, during his work with the labour movement, understood that people had a right to information and the skills needed for its analysis, which would allow them to make informed decisions.

Many union educators' manuals today are linked to specific issues, such as occupational safety and health. They provide educators with easy-to-use 'bullet points' and check lists. They are useful because they help unions to be proactive, react to time pressures and support the use of an interactive approach. But they do not have the space for the background information and theory that underpins a union approach to education, and union educators often do not have access to this background information.

### *The aim of this Handbook is to fill this gap by giving educators the opportunity to explore the why and how of union education so that they can:*

- Plan and design courses or workshops on any issue
- **Use defined principles** to design different types of education activities
- **Make informed decisions** about selecting the right type of exercises for a specific learning situation
- Situate their approach and methodologies **within a political and theoretical context.**

*To change lives, educators need meaningful information and specific skills*

*Issues and circumstances change, but the principles of union education, and the knowledge and skills needed by educators remain the same*



## The Handbook

- ➔ Places the practical approach to ‘educating the educator’ into a trade union context, backed up by stories and examples
- ➔ Provides educators with materials and creative ideas for the different ways in which programmes and activities can be designed and delivered
- ➔ Describes why it is important to use methods that respect people’s experiences and differences.

### The ‘no one size fits all approach’

Unions are different the world over. It therefore follows that union education programmes will be designed and delivered differently.

Starting from the basic principles and ideals of the trade union movement, the Handbook provides a ‘**tool kit**’ for educators, so that they can select those tools that best inform their approach to education.

During the 1980s and 90s, the ILO supported three-week residential training courses for union educators in the Asia and Pacific Region at a trade union training college (TUTA) in Australia.

The courses took into account the fact that participants came from many different countries and union sectors, languages and cultures. The methodology used ensured that they selected their own issues in tasks that allowed them to practice the knowledge and skills covered by the courses.

Many of the union officials went back to their countries and started developing education programmes that noticeably strengthened their unions. The programmes were supported by the Nordic and Dutch Trade Union Solidarity Support Organisations (TUSSOs) and the Global Union Federations.

In 1996, TUTA was abolished by the government that was then in power. The loss of these courses meant unions in the region could no longer rely on funding to train educators in programme delivery. At the same time, the availability of funding to support union education diminished. The impact on the ability of unions to organize and represent members is evident, especially today, as they struggle with reduced membership, oppressive regimes and reduced funding support.

**The Handbook is an initiative by the ILO’s Bureau for Workers’ Activities (ACTRAV) to assist trade unions to re-establish education programmes and use education as a tool to strengthen organizations and representation. It is based on the approaches and methodology that underpinned the ILO courses conducted at TUTA.**

## ■ Description

'Educating union educators' is the main focus of this Handbook, although it is also intended to provide the knowledge and skills required to design and manage a union education programme.

The training modules, which include a combination of hand-outs, session outlines and exercises, are intended to assist educators to design a range of courses and activities for union education programmes.

The approach adopted in the Handbook is based on the belief that the process of imparting information and skills to union representatives and members is more effective when educators are skilled at working with people to change attitudes and behaviour.

This approach offers learners the space to analyse and discuss new information and, in the end, to make their own decisions about wanting change.

This is a learner-centred approach, which emphasizes the need to respect and listen to those who attend union education activities. Questioning and refining education techniques strengthens communication and facilitation skills in a range of scenarios.

*Specific knowledge and skills are as important for union educators as they are for union leaders or advocates*

## The target group

**Union educators are the primary target group**, although other target groups may include:

- ➔ **Education officers or coordinators**, whether appointed or elected
- ➔ **Union officers responsible for designing workshops, conferences or seminars** intended to increase the involvement of members in decision making
- ➔ **Union leaders, organizers, campaigners and communication officers** who work closely with members and union representatives
- ➔ **Member educators and activists** who conduct education activities at the workplace and community levels, and are sometimes known as peer educators
- ➔ **Study circle leaders**, who play a major role in democratizing union structures
- ➔ **Shop stewards or representatives**, who are often 'front line' educators
- ➔ **Other people** who support unions in their development work by facilitating workshops or carrying out research.

## Introducing union education

This introduction provides the background information that is needed to promote the role of education in unions and to ensure that it is equally accessible for all union activists, members or potential members.

***The introduction to the Handbook is divided into three sections***

1. The present introduction to the Handbook
2. A second section on educating for strength
3. A third section on educating for gender equality

**The section on educating for strength** draws attention to the role that union education can play in strengthening union structures and the implementation of policies and strategies.

- ✱ The information includes a rationale for supporting a well-resourced union education programme and links it to such issues as solidarity, campaigning, obtaining paid education leave and making the union more accessible to members and workers.

**The section on educating for gender equality** emphasizes how education can strengthen the role of women in the union and the workplace by mainstreaming gender into all programmes and activities.

- ✱ The hand-outs contain information and guidance on defining gender equality, collecting statistics, identifying and analysing women's training needs, creating equitable access to activities, writing gender sensitive materials and dealing with sexual harassment and discrimination in education activities and programmes.

## **The training modules**

A training module can be defined as a self-contained unit of learning that builds knowledge and skills with clear objectives, descriptions and a logical sequence to the learning process.

- ➔ **The Handbook contains three training modules** taking educators from basic to more complex knowledge and skills.
- ➔ **Each module has self-contained 'units of learning' or sessions** containing hand-outs, session plans and exercises. These units are interchangeable and can be selected to design courses that meet the needs of specific target groups.

***Each module and its units of learning contain:***

- An aim and learning objectives
- A range of methods and techniques
- Instructions, supported by informal feedback processes and evaluation.

Units of learning can be selected from within and between the three modules, depending on the level and type of target group.

**This approach recognizes that**

- \* Not all educators can take time off work to attend a long course
- \* There are not always sufficient funds for residential courses
- \* Union educators have different levels of experience and training, and may not need all the sessions from one module

*Workers and union members who are on short-term fixed contracts or from the informal economy, with no education leave, need unions to deliver flexible programmes which recognize their employment situation and lack of rights, especially in the case of women with family responsibilities.*

**Each module contains:**

<b>A course description</b>	Which explains the outcomes, the aim and learning objectives of the course, the type of target group and level of experience needed, the recommended number of learners, the number of days required and how the course can be organized.
<b>A course timetable</b>	Which includes a sample timetable for a residential course, which can be adapted for a non-residential course or separate training blocks.
<b>Hand-outs</b>	The three modules contain a total of 23 hand-outs providing educators with information, in a logical order, about the topic of the session. They can be copied for other courses, or amended for specific target groups.
<b>Session plans</b>	For each session, there is a column of 'key points' explaining how the session can be conducted following the information in the relevant hand-out, and a column for 'session plans and exercises' that can be used as they are, or modified for a target group. Time frames are indicated for each session, some of which have sample task sheets.
<b>Task sheets</b>	Each course has a set of main tasks covering one or more sessions, which provide the opportunity for learners to practice using key skills and information. Some are intended for individual or group practice sessions, while others are group tasks. They include the purpose of the task, instructions for the task and on reporting back, and time frames.
<b>Instructions for educators</b>	The sheets for educators explain how to introduce tasks and set up groups. They describe a process for giving feedback and reviewing learning that focuses on the learners and uses questioning techniques.

## References and additional materials

The Handbook recognizes that there is a substantial body of knowledge about adult education and union education available from books, specialists, union organizations, the ILO and other trade union educators, including internet networks.

Covering all the different approaches and ideas for exercises in each training module and unit of learning would make the Handbook too long and cumbersome.

The Handbook therefore concludes with a section that provides:

- ➔ Links and references for readers or users to explore other approaches and ideas and to broaden their knowledge of the different types of adult and union education.
- ➔ A list of reading materials that have been used to compile the Handbook.
- ➔ Links to websites that can provide educators with ideas and new ways of designing and implementing education activities.
- ➔ Examples of exercises, divided into different categories to assist selection.

## ■ Using the Handbook

A builder's tool box contains the different types of tools and products needed to carry out a job. There are, for example, different types of hammers, nails and glues, all of which have a specific use.

This Handbook is a 'tool kit' because it contains the instruments needed to become a confident and competent union educator in a range of different circumstances.

The session outlines and exercises may be described as the hammer and nails of the course, and the hand-outs and background information as the glue that holds it together.

***The three modules take learners in a logical order:***

***From*** the basic skills and knowledge needed to plan and conduct a training session using active learning exercises



***To*** the skills and knowledge needed to design a course using more complex methods, with the introduction of theories and adult education approaches



***To*** the information and practicalities of designing, coordinating and managing an education programme

**Union educators have three choices when using the Handbook:**

1. Use the course designs from each Module as they are, **or** keep the content the same but change the type of course to non-residential or to one, two or three-day blocks conducted over a set period of time with the same target group
2. Make minor amendments to the session outlines, exercises and handouts
3. Design an alternative course, selecting sessions from one or all three Modules.

*Any union course or event needs to be planned using the process of course design based on logic and sequencing*

**When planning and designing training courses for educators:****First**

Define the target group



Determine the type and length of the course



Identify the current skills and experience and the type of education activities they are expected to conduct



Write an aim and learning objectives.

**Second**

Select the topics, skills and information needed from the sessions or units of learning in the three modules



Plan them into a logical course design



Check that there is sufficient time for practice sessions and other exercises



Amend the session and exercises, if necessary



Prepare hand-outs and other materials and visual aids from the Handbook.

*Educators become familiar with the topic when preparing and designing visual aids*

*Power Point presentations or other visual aids are not included with the session outlines because they need to be designed for the target group and equipment available.*

## Designing alternative courses

The Handbook recognizes that unions differ in size, financial situation, structure, policies and membership. Some have education programmes, while some only carry out ad hoc education activities.

In these differing situations, not all the topics covered in each module may be useful for all unions or target groups.

Module 3 may not be applicable if a union does not have the resources for a structured education programme, although a one-day workshop on union education policy may be useful for union leaders.

The following examples illustrate how to design an alternative course in two different situations. Other alternative courses can be found in the final part of the Handbook.

**Example 1****Background information:**

A small union without the funds for a full-time educator has two shop stewards who conduct some education activities at the workplace level.

The union wants to educate more shop stewards so that they can conduct short membership courses to raise awareness of current union issues. The courses, to be held at weekends, are already designed.

The union executive asks the two shop steward educators to design and conduct a two-day educators course for ten shop stewards, who will assist in implementing the programme of courses on current issues

**A two-day educators course for shop stewards****Course aim:**

To provide a core group of shop steward educators with the skills to conduct half-day workshops to raise awareness of current issues.

**Learning objectives;** at the end of the course shop stewards will be able to:

- Practice relevant communication skills in all workshops
- Prepare and use visual aids to support information
- Use interactive exercises that identify the experience and ideas of members
- Engage members in discussion, using short tasks

**Day 1:**

<b>Session 1</b>	Welcome and introductions (1 hour)
<b>Session 2</b>	Introducing the topics for the half-day workshops (30 minutes)
<b>Session 3</b>	Communicating with learners (1 ½ hours)
<b>Session 4</b>	Using visual aids (1 hour)
<b>Session 5</b>	Task: five-minute practice session to present information from the workshop on current issues and prepare a visual aid (30 minutes for preparation, one hour for the presentations and 30 minutes for feedback)

**Day 2:**

<b>Session 1</b>	Planning and using active exercises (3 hours)
<b>Session 2</b>	Preparing to present a 45 minute session from the workshop in pairs (30 minutes)
<b>Session 3</b>	Presenting the 45 minute session, followed by review and feedback (1 ½ hours)
<b>Session 4</b>	Implementing half-day membership courses and discussing course materials (30 minutes)

The sessions are selected from Module One



 **Example 2**

**Background information:**

The affiliated unions of a national centre have requested a training course to upgrade the skills and information of union educators so that they can design and conduct courses for branch leaders.

The National Centre requests the full-time educator to design and conduct a three-day course for the affiliate's educators.

**A three-day course for union educators with experience in conducting courses for the membership and local representatives**

**Course aim:**

Educators of affiliated unions conduct courses to strengthen the branch structures of the unions.

**Learning objectives: at the end of the course learners will be able to:**

- Discuss the purpose of union education and the role of union educators
- Design courses and sessions for branch level leadership
- Plan and use short action methods in sessions
- Write, conduct, debrief and review problem-solving role plays
- Develop a course evaluation process

**Day 1:**

<b>Session 1</b>	Welcome and introductions with an ice-breaker involving discussion of union education and the role of educators
<b>Session 2</b>	Using action methods (1 ½ hours)
<b>Session 3</b>	Problem-solving role plays (1 ½ hours)
<b>Session 4</b>	Practice task on using action methods (1 ½ hours)

**Day 2:**

<b>Session 1</b>	Learning objectives (1 hour)
<b>Session 2</b>	Planning a session (1 hour)
<b>Session 3</b>	Introducing and preparing Task One: Planning a 40 minute session in groups using a visual aid and a role play (1 hour)
<b>Session 4</b>	Preparing and presenting Task One (3 hours)

**Day 3:**

<b>Session 1</b>	Designing a short course (1 hour)
<b>Session 2</b>	Designing a short course for branch leaders in groups, with session aims and objectives (2 hours)
<b>Session 3</b>	Preparing a session from the course and conducting one exercise from the session (2 hours)
<b>Session 4</b>	Evaluating a course and session (1 hour)

The sessions are selected from Modules One and Two

## ■ Definitions of key words

The Handbook recognizes that different organizations use different terms to describe the various aspects of education, although the meanings are often the same. There is no right or wrong way to use these terms.

*These definitions are used consistently throughout the Handbook*

- ▶ **Union education:** many different names are used for education in the trade union movement, such as labour education, workers' education and trade union training. This Handbook uses 'union education' because the examples and exercises are placed in the context of trade union values and structures.
- ▶ **Education activities:** a general term describing any type of activity that is included in a programme, such as training courses, study circles and workshops.
- ▶ **Exercises:** a standard name describing the range of different techniques and action methods used in sessions and other education activities that implement the methodology of union education.
- ▶ **Learners:** a word used interchangeably with 'people' to describe those persons who attend education activities. 'Learner' is used instead of 'participant' because it better supports the methodological approach of considering people as subjects, not objects, in a learning environment.
- ▶ **Educator:** is the term used for the person who plans and implements an education activity, either in a full-time or part-time, paid or voluntary capacity.
- ▶ **Course:** means a standard education activity that provides 'training' to learners covering the knowledge, skills, attitude or behavioural change needed to carry out the work of the union.
- ▶ **Workshop:** means an activity that involves a maximum of 20 -25 learners who have something in common, either coming from the same union or sector. Prior knowledge or skills is assumed. Workshops are used, for example, to solve problems, discuss and decide on action or develop strategies and/or policy.

- ▶ **Seminars:** are larger than workshops and bring people together who have a common interest in a particular topic or issue. They can come from different unions, sectors or external organizations. Seminars may include up to 100 people and are useful for raising awareness or providing knowledge on an issue. They often use the services of resource people and guest speakers, and can include exercises.
- ▶ **Conferences:** are large events that bring people together, either from the same or different unions, and may include external people. They may involve workshops and other activities, and usually include guest speakers and plenary questions and discussion. This format is also used for large union decision-making forums.
- ▶ **Approaches to education:** describes the broad philosophy used for union education. In this Handbook, the approach is based on popular or radical education, and is learning- rather than teacher-centred.
- ▶ **Methods:** describe the ‘dimensions of union education’, which include, for example, the purpose of a programme or activity, the context, theory, principles, styles and strategies adopted. The term also makes reference to the type of attitude and behaviour required from the educator.
- ▶ **Techniques:** mean the specifics or design of an activity, such as exercises or tasks, using questioning, stories or role play.
- ▶ **Curriculum development:** describes what and how a topic, knowledge, skills, attitude or behaviour are taught, or the way that an education activity is planned and delivered. It provides standardized guidelines for what takes place in an education activity. In union education, it focusses on reflection and analysis of experiences that lead to action.
- ▶ **An education programme:** is the plan of education activities developed for a set period of time, such as one or two years. An education programme contains different types of activities for the various target groups and locations. It is based on a narrative strategy and a budgeted work plan, with a description of the implementing infrastructure.
- ▶ **Radical education:** is an education approach for social justice which encourages individual and collective responsibility to change society. It is based on questioning the status quo by developing critical analysis skills and raising awareness of inequality and oppression.
- ▶ **Popular education:** is a class-based approach to political struggle for social transformation. The word ‘popular’ can be described as ‘of the people’. It rejects the traditional banking system of education, in which learners are treated as objects rather than subjects.

## B. Educating for strength

### ■ In solidarity and unity

The approach that is adopted for union education is very different from the top-down control of management training and the academic approach of universities. The main reason is that it is based on the principles of solidarity and is implemented within a political context.

Union education is more closely aligned with the approaches of radical or popular education, described as 'learner focused', because it develops unity through the use of participatory or interactive methodology that questions oppression and the lack of rights.

A 1952 Resolution adopted by the ICFTU (now ITUC) Education Conference defined trade union education as follows:

*“ ...trade union education is not an end in itself, but one of the steps in the advance towards emancipation of mankind. The goal would be reached only when the broad masses of the workers and those representing them are in possession of all the knowledge and experience necessary to change the structures of society and banish want and fear forever. ”*

The language maybe outdated, but the sentiments are not. In varying degrees throughout the world, oppression and exploitation are still experienced by the 'broad masses' or working class (including workers, their families and the communities in which they live).

The background paper for the ILO International Workers' Symposium in 2007, *The role of trade unions in workers' education: The key to trade union capacity building*, confirms this statement:

*“ Union education is not impartial. It is aimed resolutely at the strengthening of unions as they struggle for better working and living conditions for all working people. It is education for political and workplace action with its aims set by members or affiliates. ”*

Unions will become increasingly irrelevant if they are not involved in making the world a better place for workers and their families.

***Education programmes can assist in developing activism through solidarity and unity, and can give the union more visibility in the struggle for a world:***

- ✦ Where there is no child labour and no need for economic migrants
- ✦ Where women are treated as equals, young people have a future and there is decent work for all

*Unions working together towards common goals, interests and values*

- \* Where all people have equal access to health services, education, housing, water and energy
- \* Where human rights and political freedoms are respected and all people can live in dignity and peace.

Union education plays a major role in bringing together workers and union members from similar and different unions, at both the national and international levels. It gives gives them an opportunity to discover that their problems and struggles are similar, and to share tactics and strategies.

*Union education strengthens solidarity by uniting workers*

Action relating to disputes and rights is more likely to be successful if it is supported nationally and globally, this can occur when people have a deeper understanding of what is happening to others.

Education gives workers a rationale and the motivation to support solidarity action by raising political awareness and encouraging unity.



**Which tools does your union use to create solidarity between members and workers, and how effective do you think they are?**

**How do you think union education can contribute to strengthening national and international solidarity?**

## ■ Union education as part of union strategy

*A union that has a strong membership base can demonstrate that it:*

- \* Acts in solidarity and promotes collective action in place of individualism
- \* Listens to and involves members in decision-making and representation
- \* Is committed to the democratic principles of union organization with open and transparent structures
- \* Implements non-discriminatory practices in all areas of work, with emphasis on gender equality and equity.

**Union education contributes to a union strategy by:**


- ➔ Building involvement and confidence through the development of skills and knowledge
- ➔ Changing attitudes and behaviour about issues and union values
- ➔ Providing opportunities for sharing ideas and experiences in support of policy development and implementation.

*Union education programmes need a policy, resources and trained educators to be able to contribute effectively to the union's strategic plans*

Unions can use education as a tool to assist in strengthening negotiation, representation and campaigns. Education involves members in action and raises commitment to policy implementation because the purpose is better understood.

**A well planned and resourced union education programme is an integral part of strategy implementation.**

**Union education activities can also play a major role in collective bargaining in workplaces where women are in the majority**

 **Example: collective bargaining workshops are planned in the education programme when agreement negotiations are scheduled:**

- \* They are used to explore the legal and union bargaining process, organize the role of members in the process and develop confidence in the negotiations
- \* They provide the opportunity for women to raise their issues, be involved in writing them into the clauses of the agreement and negotiating the agreement
- \* Problems and dangers can be discussed and minimized, and the union can present a united front to management
- \* The workshops can be conducted by member educators or shop stewards, and union leaders can be invited to participate

*Result: members are informed and women participate, the bargaining strength at the workplace is increased and members have ownership of the outcome.*



**How does your education programme contribute to the union's overall strategic directions?**

**How involved in negotiations do you think members can be, and what type of role can they play at the workplace level?**


## ■ The role of union education in providing knowledge and skills

With the increased attacks on trade union and workers' rights, unions are often forced to react quickly to situations.

This, together with the never ending changes in industrial relations laws and management practices, leaves little time or resources to think and act proactively.

### *It helps if union representatives:*

- \* Understand the concepts of trade union and workers' rights, and have the skills to put them into practice
- \* Are fully conversant with the union's policy, strategic directions and current issues.



*Unions need to update the skills and knowledge of representatives at all levels on a regular basis*

Maintaining and updating the knowledge and skills of union representatives helps the union to deal more effectively with constant change.

- ➔ Education gives representatives a **better understanding of the causes and impact of abuses** of trade union and workers' rights
- ➔ **Employers and governments are more likely to listen if** union representatives and members have a sound knowledge of the situation and the skills and confidence to negotiate in good faith.

Workshops or training courses are an effective way of providing information because they give representatives the opportunity to discuss and articulate new information and develop relevant action plans and strategies.

Although union leaders can disseminate information about current issues to representatives, the union can never be sure that representatives are able to articulate these issues in meetings and discussions.

***Written information is useful as reference material after a training course.***

 **Example: the government has brought in new health and safety laws which involve changes to workplace health and safety agreements.**

**Shop stewards have to negotiate these changes with management so that members do not lose benefits and rights**

- \* The education programme has budgeted for and scheduled a series of topical issue workshops and training courses throughout the year
- \* The union uses some of these courses to update shop stewards on the changes and give them the confidence to negotiate with management
- \* The shop stewards return to the workplace, hold meetings to inform members and discuss how to deal with the problem before arranging with management to update the agreement

*The results: the members see that the union is concerned about their rights. They understand the situation and see that the shop stewards have maintained, and in some cases improved clauses in the health and safety agreement*



**How does your union provide courses to support the skills needed by representatives at the workplace? How effective do you think this is?**

**What are the problems your union experiences when reacting to current issues, and how do you think that this could be integrated into an education programme?**



## ■ The role of union education in involving workers and members

Union representatives and workers traditionally come together to talk about problems and find solutions. This simple activity is the basis for solidarity and unity within a union.

It is also the basis for the methodology that is used to varying degrees in most union education programmes. It is an approach that involves representatives, members and workers actively in the learning process and the union.

*Education that uses the experience and knowledge of members makes them feel part of the union and helps to solve problems*

***This approach respects the fact that workers are adults who:***


- ★ Have life experiences and are capable of finding solutions to problems
- ★ Know when they are being exploited and can identify employer actions and laws that are unfair and unjust.

***An education programme provides***

- ➔ Information that explains why certain actions and laws are unfair and oppressive
- ➔ Activities that give workers the opportunity to use their own experience
- ➔ The knowledge and skills to resolve the problems they face at the workplace and to participate actively in the union.

*Education activities raise awareness of issues and help to mobilize workers to participate in campaigns*

Education helps members to speak up in meetings, be involved in decision-making forums and contribute ideas to policy and implementation, resulting in committed members with loyalty to the union.

 **Example: workers from rural areas collecting waste in the city are in the informal economy, which means that they have no rights, no union and no protection from exploitation.**

**A group of workers have formed a committee in their area and have approached a local government union to assist them, but do not want to unionize formally at this stage.**

- ★ The union agrees to assist and a union educator sets up a meeting with the workers' leaders
- ★ At the meeting, the union educator asks questions about their situation, how they want to deal with the problems that they are experiencing and what they need from the union
- ★ The union educator discusses the content of a series of workshops with the committee and then assists by facilitating them at times that suit the workers, taking into account any literacy and language difficulties
- ★ The union agrees to fund the workshops and provide an educator/facilitator and interpretation, if necessary

*Results: the workers have ownership of the programme and the workshops are well attended. The committee negotiates with the local government and improves the pay rate. The workers have asked to join the union and the union amends the constitution so that they can affiliate as a group*



**How does your union engage members in problem solving and decision making, and who is involved?**

**Share how you think workers in the informal economy can be organized. What role should unions play in recruiting from non-traditional sectors?**


## ■ The role of union education in promoting campaigning in the world of today

Neo-liberal capitalism encourages regular economic crises, and each time a crisis occurs the gap between the rich and poor grows. The middle class in industrially developed countries gets smaller, and is prevented from taking shape in less developed countries.

National governments are losing their democratic legitimacy as the lobbying power of the financial sector and multinational enterprises grows stronger.

Most workers have no job security and are paid lower wages. Rights at the workplace are being eroded and informal economy workers have no rights or social protection.

The International Monetary Fund (IMF) places conditions on loans requiring a reduction in public services, spending on social protection and wages. Public services are privatized and austerity packages are introduced.



*Campaigns involving union education can prevent the fall in union density caused by anti-union strategies*

### ***As a result***

- ✦ Workers lose jobs and unemployment increases, especially for young people. More workers, particularly women and migrants, move into the informal economy. Governments lose tax revenue and unions lose membership and financial resources.
- ✦ Privatization increases the cost of public services, which in turn become unaffordable for the majority of the population.
- ✦ Those in the workforce face work overload, stress, ill health and loss of conditions and rights.

Union education assists union members and representatives to recognize the causes of this situation, so that they can understand its context.

As a result, members and workers are more likely to become involved in campaigns and action.

 **Example: the IMF has told the government to reduce public sector jobs as a loan condition**

### Unions organizing in the health sector call a meeting of education officers and shop stewards to discuss the education component of a nationwide campaign

- \* The education activities focus on medical and administrative workers in all parts of the health service
- \* Education resources are shifted to fund a mass awareness-raising programme, which is now a priority
- \* One-day workshops are held for shop stewards and educators so that they can conduct one-hour workplace meetings to discuss the impact on the health sector and jobs
- \* Materials include a short DVD, flyers and hand-outs that workers can take home to their families, and a media strategy is put in place
- \* The campaign creates awareness and members take the issues up in their communities

*Results: the campaign reaches a large number of people. The government receives petitions. Workers and the public support a demonstration. The government agrees to minimize job losses in the health sector and include the union in all future discussions*



**What type of awareness-raising activities does your union hold, and how is the education programme involved?**

**How important do you think it is for unions to reach out to members and involve them in political debate?**

**How would you analyse the media's role in blaming the economic crisis on working people and the unemployed?**

## ■ The role of union education in making unions relevant and accessible

The history and traditions of the trade union movement give us clues and ideas for the future. History is built up from individual and collective experiences, shared many times and shaped by the political, social and economic events of the time. Trade unions react to these events and influence the outcomes of history.

Union education in turn contributes to the history of the union movement by shaping the experience of many activists. Educators have given union education a place in union history. Over time, a body of knowledge has developed with its own unique theories and a discourse underpinning the methodological approach to learning.

*Union education is influenced by the history of the union and contributes to its future*

***This approach to union education recognizes the importance of challenging the thinking of workers in the struggle for social justice and is underpinned by some accepted principles:***

- ✦ Raising individual awareness creates the power and ability to change society through collective action
- ✦ Women, young people, migrant workers and workers in the informal economy need to be treated equally and inclusively
- ✦ Gender equality has to be mainstreamed into all activities and programmes
- ✦ Giving workers ownership of learning creates interest and motivation and is supported by the sharing of life experiences
- ✦ The valuable life experiences of workers are acknowledged and used in all education programmes and contribute to union decision-making
- ✦ Collective problem-solving, as a central component of all activities, is based on relevant and real issues that activate members and lead to decision-making
- ✦ The content of union education is based on the expressed needs of workers and recognizes gender, language, literacy and cultural differences.

*Workers need to believe that the union is listening to them*

 **Example: a union wants to organize more young workers in the IT sector**

The union refers the problem to the education department and asks it to plan some activities:

- ✦ The educators organize an evening event in a nearby coffee shop
- ✦ The first evening is only attended by a few people and is used informally to explore their working situation and what they see as problems
- ✦ The evening is repeated over the next few weeks and attendance increases
- ✦ Based on what the young workers say, the union organizes workplace meetings to discuss issues related to the problems they have identified and to involve them in finding solutions

*Results: young workers begin to join the union and take on the responsibility of continuing to organize using social media and informal social activities. The union sets up a young workers group and the group leaders play a major role in organizing*



**How does your union record the history of the union, and how relevant do you think history is in educating members and workers?**

**What strategies does your union have for organizing young workers, and how do you think an education programme can help in attracting young workers?**

## ■ The union educator

Some unions have an education department and appoint full-time educators, while others entrust an elected officer with responsibility for coordinating a programme that uses shop stewards and activists as educators. Some use a combination of these methods.

*Most programmes depend on unionists being willing to commit their free time to either attending educational activities or conducting them.*

The role of the educator is both challenging and rewarding:

**Rewarding** in view of the direct contact with union members, and exciting when activists emerge as a result of the education. Educators have the opportunity to work with people who are often marginalized by the union and to see their confidence develop.


This is a positive way of helping to strengthen the union and of playing a role in social change. In itself, it is a learning experience.

**Challenging** because the union leadership often does not understand the important role that education can play in strengthening the union. Developing an environment that encourages learners to question and explore issues may be seen as challenging union policy.

Specific knowledge and skills are needed by union educators, in the same way as they are for school teachers or adult educators. Without training, union educators are likely to rely on a lecturing approach, which means that members miss out on sharing and learning opportunities.

*The impulse for educators to be ‘experts’ or ‘teachers’ means that learners are not encouraged to find the answers themselves.*

*An educator needs to be an activist with good listening skills and a sense of humour*

 **Example: a union has established a pool of member educators to provide half-day workshops for members on topical issues**

**There have been complaints that the workshops are dull and participation has dropped:**

- \* The union leadership has sent out a questionnaire to find out why
- \* The results indicate that members feel they are not being listened to and it is a waste of their time, and they think that the educators are not well prepared
- \* The leaders find that the educators have not received any training from the union
- \* They meet the educators to discuss their training needs and agree on a training programme
- \* The leadership finds funding to implement a series of one-day training courses spread over a period of one month. Following these courses, each educator is mentored by an experienced educator until they develop confidence

*Results: more members apply to be educators. The workshops are popular and well attended. More workers join the union and the level of activism increases*



**What do you find to be the most challenging and rewarding parts of being a union educator?**

**What type of training has your union given to educators, and what type of resources can be made available for educator training?**



## ■ The international framework

Under the terms of the ILO Paid Educational Leave Convention, 1974 (No. 140), unions have been entitled to paid trade union training leave since 1974. The Paid Educational Leave Recommendation, 1974 (No. 148), which supplements Convention No. 140, provides guidance for policy development and implementation, and for resourcing and granting leave.

Convention No. 140 covers different types of paid educational leave, and clearly provides that it includes leave for trade union education.

*Lifelong learning opportunities are important for workers and are considered to be a human right. They offer workers career paths and more interesting jobs*

**Articles 1 and 7** establish the responsibility of the employer to grant leave over a specified period and to ensure sufficient financial support on a regular basis.

**Article 2** identifies three areas to be covered by paid educational leave; (a) training at any level; (b) general, social and civic education; and **(3) trade union education**. Countries are required to develop policies to promote the granting of paid educational leave.

**Article 3** recognizes that each of these types of education has a different focus, and emphasizes the importance of education in creating competencies and of the active participation of workers and **their representatives**.

**Article 5** establishes that these rights can be provided through legislation, collective agreements, arbitration awards or whatever is consistent with national practice.

**Article 8** emphasizes that there shall be no discrimination in applying the policy, and that no worker shall be denied leave *on grounds of race, colour, sex, religion, political opinion, national extraction or social origin*.

The Human Resources Development Recommendation, 2004 (No. 195), is also relevant as it places importance on education, training and lifelong learning for individuals, enterprises, the economy and society as a whole. It is particularly relevant for the achievement of Decent Work for all, and calls on governments and employers to provide the legislation and finances for paid education leave.

*Up to now, only 34 countries have ratified Convention No. 140. In Asia, it has only been ratified by Afghanistan*

### ***The importance of paid educational leave for union education***

- ★ Union representatives and members often take their annual leave to attend trade union training activities
- ★ Women, who have family and other responsibilities, find it difficult to attend
- ★ Paid educational leave is of direct benefit to workers and is a good organizing issue

- \* Workers can campaign collectively for paid educational leave, either through legislation or in a collective agreement.

There have been a number of union campaigns in support of paid educational leave over the years, and campaigns in Europe and North America have achieved some results. However, surveys have found that paid educational leave is not a priority for any of the tripartite partners.



**Example: the union leadership meets to discuss the issue and decides that paid educational leave would encourage more members to take positions in the union**

- \* The national centre carries out a survey to find out how many enterprises provide paid educational leave and what form it takes
- \* The unions hold membership meetings to discuss the issue
- \* The unions decide to carry out a country-wide campaign that includes raising awareness among members, training programmes for shop stewards and local radio programmes
- \* The union leaders hold meetings with the government and employers, and request assistance from the ILO

*Results: the government eventually agrees to ratify Convention No. 140. The unions intensify their community and workplace campaigns. Membership increases, especially among women.*



**Do workers in your country receive paid educational leave? How is it provided, and who can have access to it?**

**Do you think paid leave for union education would attract more members, or would it have the effect of taking away the commitment to trade union activism?**

## C. Educating for equality

### THIS SECTION COVERS:

- ▶ Union education in support of gender equality
- ▶ Integrating gender equality
- ▶ A gender equality exercise and a course statement on sexual harassment and discrimination

This section focuses on the specific issue of gender equality, but also recognizes that ‘equality’ involves a rights-based approach for all marginalized people.

Equality consists of the absence of discrimination throughout society, including in education, opportunities, resources, services, benefits, decision-making, power and influence. Union education helps in the achievement of equality outcomes and results.

*The ILO promotes gender equality not only as a basic human right, but also as intrinsic to the goals of Decent Work and poverty alleviation*

### ***On 3 January 2012, ACTRAV disseminated the following statement on gender promotion***

ACTRAV assists trade unions in their efforts to promote greater gender equality in the world of work and within their own structures and policies. This includes support for building union capacity to lift obstacles to and strengthen representation of women within trade unions, to promote gender sensitive collective bargaining and social dialogue, ***to develop strong gender dimensions of trade union education programmes. Awareness-raising and campaigning for gender equality and women’s leadership training of trade union representatives also receive support*** (emphasis added).

ACTRAV, in cooperation with other units of the ILO, implements programmes assisting trade unions to strengthen their technical expertise in areas such as labour law, employment policies, social protection, wages and occupational safety ***with strong gender equality dimensions***. ACTRAV provides support to trade unions for developing their policies and programmes reducing the gender pay gap, strengthening maternity protection, reconciling work and family.

## ■ Union education in support of gender equality

*Diana Holland, Chair of the ITUC Women's Committee at the June 2010 ITUC Congress, reminded delegates that:*

Women constitute half the world's population, perform two-thirds of the work, but earn just 10 per cent of the income and own only 1 per cent of property

Women make up the majority of workers with precarious jobs and of workers in the unprotected informal economy.

Women constitute nearly half the world's migrants, and the trafficking of women is increasing. The ILO also estimates that 18.7 million more women lost their jobs in 2009 as a direct result of the financial crisis.

Union education assists unions to organize women and young women workers. It does so because the union approach to education is inclusive and:

- ✦ Allows women to share stories and unique experiences and contribute to debates and ideas for the future
- ✦ Provides the space for women members and activists to receive leadership education, ensuring that they can bring their values to enhance union negotiations and representation
- ✦ Gives women confidence and inspires them to take on positions and become activists.

*Capitalism today continues to undermine the wages and working conditions of women, and prevents them from joining unions*

**Example:** a Public Services International (PSI) education project in Tamal Nadu, India, coordinated a three-year project of education for rural and urban health workers. These workers were all women. They did not have a union and had not been approached by the public service union federations.

The project coordinators met with activist health workers to find out what they needed. The education programme focused on these needs.

*The results demonstrate what women can do if they have access to union education. They formed a union, negotiated successfully with the government, not only for better conditions of work, but also improved health-care centres. They affiliated with the federation, took up leadership positions and ran their own union.*

Most unions and national centres have gender equality strategies and structures for policy implementation. In some parts of the world, these help women to gain access to leadership positions, although there is often no real commitment to their implementation.

The ITUC Action Programme on Achieving Gender Equality in Trade Unions notes that:

Trade unions make a difference to the lives of women. Trade unions need women members but can only deliver real benefits if they take seriously the imperative to identify women's concerns and take targeted measures to support women at work and in the trade union democratic structure.

## ■ Defining gender equality

▶ **Gender** - refers to roles, attitudes, values and behaviours that men and women are encouraged to adopt by their culture and society, which means that the characteristics of gender vary from country to country.

▶ **Gender relations** - describe the rules and social relations in a society including, for example, how power is divided between men and women and how it is used or abused.

▶ **Gender equality** - means that the rights, responsibilities and opportunities of people do not depend on whether they are women or men, but take into account the interests, needs and priorities of women.

▶ **Gender inequality** - stereotyping plays a major role in creating inequality and leads to generalizations or assumptions being made about the places, objects or activities with which women and men are associated. Stereotyping often has negative connotations, as it locks women into roles, denies them education and prevents them from progressing at work.

Gender equality also arises out of social and cultural attitudes and values, including the exercise of power and control, which usually discriminates against women.

▶ **Diversity** – involves recognizing and valuing differences between groups and individuals in a society, which prevents discrimination and creates a culture that respects and values difference. This benefits women and others from all parts of a society who are considered different.

▶ **Gender awareness or perspective** - assists people to understand the differences between sex and gender roles and to recognize that gender roles can be changed. For trade unions, it means recognizing the gender biases in law, employment and labour practices, as well as in their own organizations.

▶ **Gender mainstreaming** - may be defined as the re-organization of decision-making processes, policy and work practices in all organizations, including trade unions, to ensure women are treated equally with men.

*Gender does not describe the biological difference between men and women*

It recognizes the existence of unequal gender relationships, takes into account both direct and indirect discrimination, and promotes equal treatment and opportunities for both women and men with an equal distribution of measures and benefits.

► **Participatory gender audits** - the ILO provides training and guidelines on the use of participatory gender audits in organizations, including unions, to promote organizational learning for practical and effective gender mainstreaming.

It is a tool that uses participatory research and processes to establish statistical evidence on gender equality. From this information, organizations can develop policies and practices to improve programmes, structures, decision-making processes, career paths, pay equity and access to education and training for women. A participatory approach offers ownership of gender equality initiatives and deepens people's understanding of the issue.

*Unions can also take advantage of this training and include it in an education programme. Several of the Global Union Federations have implemented gender audits with ILO support.*

These definitions can be used as discussion points in role plays, demonstrations, mimes or sculptures, metaphors, pictures, cartoons or storytelling.



*Example: in a workshop to develop a policy on gender equality*

**Divide people into three small groups with a mix of women and men and ask them to read and discuss the following three statements and note down their responses to share with the other groups.**

'When a government introduces laws to support gender equality in the workplace, both unions and employers limit the implementation of the law to carrying out surveys and setting small quotas for women's participation.'

'Gender equality issues are marginalized by trade unions. Male-dominated unions prefer to isolate women from decision-making bodies and expect them to deal only with gender or women's issues.'

'Young women are not interested in joining trade unions because they feel constrained by male, undemocratic structures that do not provide opportunities for creative initiatives and actions.'

**An alternative would be to set up separate debates on each statement, with two groups for each of the statements (depending on the number of learners). Ask one group to argue in support of the statement, and the other against it.**

**After the debate, facilitate a plenary discussion that generates ideas on how unions can change to be more gender sensitive and inclusive**

*Gender equality in education can change the attitudes and behaviour of men and women. Participatory exercises that provide time for problem-solving, dialogue and reflection are therefore important in providing support to learners to make these changes.*

## ■ Integrating gender equality (or mainstreaming gender into education programmes)

### Keep disaggregated statistics and data on women's participation.

The keeping of statistics provides evidence on the gender equality situation in the education programme.

#### Collect statistics on:

- ➔ The number of women and men who are expected to participate in the course and programme plans
- ➔ The number of women and men who actually participate
- ➔ The number of women and men contacted to attend an activity
- ➔ The number of programmes and leaflets disseminated to both women and men members
- ➔ Where they were distributed - to the Women's Committee, or just sent to the leadership at the branch or national level?

*Demonstrating the actual number of women compared to men is a powerful tool in bringing about change*

These statistics should be recorded in course and programme plans and in activity and programme reports.

#### Analysing the statistics:

After the statistics have been collected, research can be carried out on why the number of women has either increased or decreased.

The information can be collected from surveys or interviews, and can be included as a narrative description to accompany the statistics.

***Graphs and charts can be used to make comparisons and show visually whether the situation is improving or getting worse.***

### Identifying the issues and needs of women workers and members

It is important to ensure that training needs analysis identifies the specific needs and priorities of women, as expressed by the women themselves.

#### Ask questions such as:

- ★ What are the particular problems facing women in the target group nominated for the activity or programme?
- ★ What is the balance between women and men in a sector? Is there a higher percentage of woman workers in a sector, and has this been factored into the expected participation of women?

- ✦ What are the specific skills or knowledge that women may require and what are the differences with men's needs?
- ✦ What are the union statistics on the number and percentage of women leaders at the different levels of the union? How can education increase the numbers of women at the various levels, and what knowledge and skills do women need?
- ✦ If it is an issue based course, for example on climate change, what are the specific issues relating to women?

*Always involve women representatives in programme and course planning*

## Ensuring women have access to and can attend education activities

Women have different priorities and needs from men. They are usually responsible for domestic duties at home, child care, picking children up from school or looking after aged relatives.

All education activities should be planned taking these factors into account.

The planning of evening workshops usually means that many women are not able to attend, or that women with small children may need child care.

### Questions to ask during programme planning:

- ✦ Can the union provide child care?
- ✦ Will women have access to transport?
- ✦ Can women obtain education leave?
- ✦ Are the venues and hours of the courses suitable for women with families?



## Gender-sensitive materials and curriculum

*Ensuring that a course is sensitive to gender begins at the planning and preparation stage.*

**Check that:**

- \* Exercises do not discriminate against women who are participating
- \* Plenary discussions use questions that do not exclude women from contributing
- \* Case studies include men and women in the stories, and exercises assist learners to differentiate between the situation for women and men
- \* Hand-outs use gender-sensitive language – the use of ‘he and him’ can be avoided by using inclusive words, such as ‘we or they’;
- \* Role plays include roles for women and men, and role plays and scenarios have equal numbers of women and men
- \* Grievance handling problem-solving exercises state whether the person is a women or a man, because the approach to solving the problem may be different
- \* Words such as ‘chairman’ should be changed to ‘chair’ or ‘chairperson’.

**During the activity:**

- \* If it is a long course or a residential course, there needs to be a female and a male educator
- \* Hand out a notice explaining the concepts of sexual harassment and discrimination to each learner. Give a verbal explanation of the statement and appoint or nominate a contact person for people who experience or are concerned about harassment
- \* Recognize that women often find it intimidating to speak in front of men, and encourage them to participate
- \* Prevent sexist remarks and male domination during debate
- \* Ensure that there is equal representation of women and men in group work, where possible, or at least prevent women from being isolated from other women

## Education activities for gender equality

*There is an on-going debate about whether a programme should offer separate education for women.*

Some points to consider in discussions:

- ➔ If women have had less access to formal education, they may not initially have the confidence to contribute when men are present. Separate courses for women can build confidence and offer skills development in a safe environment.
- ➔ Courses can be made available for new women members or activists so that they can gain the confidence to speak out and articulate issues.
- ➔ Women need the skills and information to contribute to all union issues and actions, not just those on gender equality. General education activities should not marginalize women members from these issues.
- ➔ Men also need educating on gender equality issues and joint courses can assist them to gain a better understanding of gender equality. If gender equality courses are only run for women, the perception is that men do not have a responsibility in resolving the issue.

*These points need to be discussed by the education committee with the women's committee, and joint decisions made about the type of education activities that meet the needs of women and how they can be planned into a programme.*



**What is the situation with regard to union or national centre policies on gender equality in your country, and how can it be improved?**

**If there are laws to support gender equality, how well are they implemented by the union and do they make a difference to women workers?**

**How does your union define the terminology surrounding gender equality, and is it used effectively in education and union activities?**

**Does your union constitution set out an agreed percentage for participation by women and men, and how is it implemented?**

## ■ A gender equality exercise

### Gender sensitivity in union education

*(This is intended as part of a session on gender equality issues in education in a basic course for new union educators)*

**The educator divides the learners into mixed gender groups of a maximum of six people and hands out the task sheet**

#### Group task:

In your nominated groups:

- ★ Read the following definition of gender  
‘The roles, attitudes, values and behaviours that men and women are encouraged to adopt by culture and the societies they live in’.
- ★ Discuss this definition:  
And identify how this impacts on women and men in terms of
  1. Access to resources and education
  2. Participation in the union education programme
- ★ Identify and list:  
How the union can increase the participation of women and young women in education programmes.
- ★ Write a metaphor:  
To describe what an education programme feels like when women participate fully

**Prepare a report back for plenary on: (1) what you have identified that unions can do to increase women’s participation in education programmes; and (2) your metaphor. (preparation time 30 minutes)**

## ■ A sample sexual harassment and discrimination course statement

### Policy statement

The trade union movement globally has a policy of zero tolerance of sexual harassment and any forms of discrimination at the workplace, in trade union meetings, conferences, workshops and training courses. In union education, any form of sexual harassment and discrimination is considered unacceptable behaviour from educators, resource persons and participants.

### Definitions

Sexual harassment is any unwanted conduct of a sexual nature that is offensive, patronizing or threatening and causes the recipient discomfort or humiliation, or which interferes with the recipient's performance or ability to benefit from any education or training activity.

In all these situations, it creates an intimidating environment at the workplace or in any trade union activity, and prevents people from contributing in education programmes. It includes:

- \* Unwelcome comments or suggestions that are sexual in nature, such as jokes, unwelcome remarks, hints or sexual advances, unwelcome graphic comments about a person's body, attire or age.
- \* Unwelcome and inappropriate enquiries about a person's sex life, including, gestures, indecent exposure, rape and any displays of sexually explicit pictures and objects.
- \* Attempts or promises to provide a job or to influence the process of employment, promotion, education, discipline, dismissal, salary increments or other benefits of any employee or job applicant in exchange for sexual favours.
- \* Discrimination includes any derogatory remarks, actions or gestures made about a person's age, culture, ethnicity, religion, economic situation, sexual orientation, gender, language or physical challenges and is considered to be unacceptable behaviour.

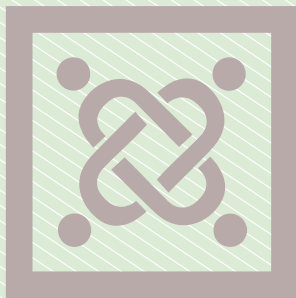
### Procedures

- The course committee and educator will nominate a contact person with whom people can communicate if they experience any of the above situations.
- The role of the contact person is to discuss the options available for dealing with the situation and to give advice and support.
- The person experiencing harassment or discrimination has the final decision on what action, if any, is to be taken.

**All information disclosed to the contact person is confidential and will only be shared with the permission of the person concerned.**

# Part 2

## THE TRAINING MODULES



**Module One.** Basic training for educators

**Module Two.** Advanced course for educators

**Module Three.** Designing and managing a union education programme



# Module One:

## Basic training for educators



- ▶ Course description
- ▶ Sessions
- ▶ Information for educators/hand-outs
- ▶ Tasks and information sheets







# > Module One > contents

Basic training for educators

Course description .....	i
Timetable .....	iv



SESSION ONE: Welcome and introductions .....	1
SESSION TWO: Union education today .....	6
SESSION THREE: Communicating with learners .....	9
SESSION FOUR: Using visual aids .....	13
SESSION FIVE: Activists as learners .....	15
SESSION SIX: Learning objectives .....	18
SESSION SEVEN: Planning and using active exercises .....	21
SESSION EIGHT: Planning a session .....	26
SESSION NINE: Using film in a session .....	28
SESSION TEN: The role of the union educator .....	30
SESSION ELEVEN: Using role play and case studies .....	33
SESSION TWELVE: Evaluating a session .....	38



HAND-OUT 1: Welcome and introductions .....	1
HAND-OUT 2: Working in groups .....	7
HAND-OUT 3: Communicating with learners .....	11
HAND-OUT 4: Using visual aids .....	19
HAND-OUT 5: Activists as learners .....	25
HAND-OUT 6(A): Different kinds of learning .....	31
HAND-OUT 6(B): Learning objectives .....	37

HAND-OUT 6(C): Active words for learning objectives .....	41
HAND-OUT 7(A): Active learning exercises .....	43
HAND-OUT 7(B): Selecting and conducting active learning exercises ...	51
HAND-OUT 7(C): Asking questions .....	59
HAND-OUT 8: Planning a session .....	63
HAND-OUT 9: Using film and guest speakers .....	73
HAND-OUT 10: The role of the union educator .....	79
HAND-OUT 11(A): Using role plays .....	85
HAND-OUT 11(B): Writing case studies .....	91
HAND-OUT 12: Evaluating a session .....	95



INFORMATION SHEET 1: Introducing the main tasks .....	1
INFORMATION SHEET 2: Instructions for reviewing tasks .....	4
TASK SHEET 1: Giving a ten minute presentation .....	6
TASK SHEET 2: Conducting a 20 minute session .....	7
TASK SHEET 3: Conducting a 40 minute session .....	9

## Course description

### ■ Target group

- Newly appointed or elected union educators
- Shop stewards who play a role in education programmes at the workplace.

*Every course should aim for equal gender representation.*

*Training gives union educators confidence to work with a group of union representatives or activists so that they can fulfill their respective roles with confidence*

### ■ Outcome

The union has a core group of union educators contributing to the implementation of a union education programme who use active methods to encourage participation and activism.

### ■ Description

Union educators, like school teachers, need the relevant skills and information to be effective educators.

Module One provides union educators with the basic skills and information needed to design and implement a session on a union topic, using a range of interactive methods.

#### **Module One is a prerequisite for Modules Two and Three**

- A total of 15 – 20 learners is recommended per course to allow time for the practice sessions.
- The Module can be implemented as a five-day residential course, a six-day non-residential course, or as two non-residential three-day courses.
- It can be followed up with opportunities for learners to work with or observe more experienced educators after the course.
- The Module requires a minimum of two educators.

*Other elected officials who communicate regularly with members may also find this course useful*

The Module is designed around three practice sessions in which learners practice the skills and knowledge covered in previous sessions.

**The first practice task** is a 'getting to know you' exercise and asks individuals to prepare a 5-10 minute presentation about their union, using a visual aid.

**The second practice task** asks learners in pairs to prepare and present a 20 minute session on a topical union issue, using a visual aid and a small interactive exercise.

**The third practice task** asks learners, in small groups, to use all the information and skills covered by the Module. The groups prepare and present a 40 minute session that includes the presentation of information using short exercises and visual aids, and a short role play film or case study.

*The Module contains hand-outs, a timetable and examples of session outlines and exercises to guide the educator*

## ■ Learning objectives

*At the end of the course learners will be able to:*

1. Establish a participatory democratic environment that integrates gender equality and diversity issues.
2. Discuss the role of union education in strengthening unions.
3. Prepare and use visual aids that support a presentation.
4. Write learning objectives for each session.
5. Describe and use learning methods that encourage learners to participate actively in the union.
6. Prepare and plan a logical session within a specific time frame.
7. Discuss the benefits of using film in a session and facilitate a debate about the issues raised.
8. Conduct role plays, write a case study, facilitate a role play and give positive and constructive feedback to assist the learning process.
9. Evaluate the sessions that they conduct.

## ■ Hand-outs

The hand-outs provide educators with the background information needed to conduct each session. They can be printed out as they are, or adapted to suit the target group. They provide examples of situations and exercises.

## ■ Session plans and timetable

The session plans offer an example of how a session can be conducted and the type of exercises that can be used. Each session plan follows the timetable and is based on the

information contained in the hand-outs. Educators are encouraged to adapt the session plans to suit the experience and level of the target group.

**The session plans:**

- Explain the learning outcomes
- Identify key points and information that need to be covered in each session
- Suggest ideas for exercises.

The welcome and introduction session assists in establishing a positive learning environment. It recommends the setting up of a course committee to help prevent problems and provide learners with some ownership of the course.

Each session follows the principles of popular or radical education, and begins with an activity that allows learners to share their experiences and knowledge of the issues to be covered. The educator acknowledges and uses learners' experience to create debate and discussion.

New information and skills are introduced after learners have had the opportunity to share experiences. This is followed with problem-solving, discussion and practical exercises.

Each session ends with a summary of the learners' input, in the form of feedback or discussion, so that everyone can leave the session with a sense of achievement.

# Timetable

## Basic training for educators course timetable (residential)

Day One	Day Two	Day Three	Day Four	Day Five
<p><b>1. Welcome and introductions</b> Administration and course description Setting up a course committee</p> <p><b>2. Union education today</b> <i>Discussion and group work</i></p>	<p><b>Presentations Task 1</b> Feedback and summary</p> <p><b>5. Activists as learners (one hour)</b></p>	<p><b>8. Planning a session</b> <i>Information and plenary discussion</i></p> <p><b>Introducing Task 2</b> Conducting a 20 minute session <b>Preparation</b></p>	<p><b>10. The role of the union educator</b> <i>Plenary discussion</i></p> <p><b>11. Using role play and case studies</b> <i>Information and group tasks with feedback</i></p>	<p><b>Preparation (cont.)</b> one hour <b>Presentations</b></p>
<b>Lunch</b>	<b>Lunch</b>	<b>Lunch</b>	<b>Lunch</b>	<b>Lunch</b>
<p><b>3. Communicating with learners</b></p> <p><b>4. Using visual aids</b> <i>Information and demonstrations</i></p> <p><b>Introducing Task 1</b> Giving a 10 minute presentation Feedback</p>	<p><b>6. Learning objectives</b> Information and group tasks</p> <p><b>7. Planning and using active exercises</b> <i>Information and discussion</i></p>	<b>Presentations Task 2</b>	<p><b>Using role play and case studies (cont.)</b> <i>Information and group tasks with feedback</i></p> <p><b>Introducing Task 3</b> Conducting a 40 minute session in groups</p>	<p><b>Presentations (cont.)</b> Feedback and review</p> <p><b>12. Evaluating a session (1 hour)</b> <b>Course evaluation</b></p>
<b>Dinner</b>	<b>Dinner</b>	<b>Dinner</b>	<b>Dinner</b>	<b>Dinner</b>
<b>Preparation for Task 1</b>	<b>8. Planning and using active exercises (cont.)</b> <i>Task and role play</i>	<b>9. Using film in a session</b> <i>Watching a film and discussion</i>	<b>Preparation for Task 3</b>	<b>Course dinner</b> <b>Presentation of certificates</b>



# SESSION ONE

## Welcome and introductions

 **1 1/2 Hours**



### Aim:

- ➔ To establish a learning environment that encourages the sharing of experiences and collective activism

### Learning objectives: at the end of the session learners will be able to:

- ➔ Plan introductory exercises and ice-breakers that are relevant to the course
- ➔ Assist people to get to know each other
- ➔ Demonstrate a democratic approach to education

### Materials:

- Flip chart, board and markers
- Name cards, post-it notes in two different colours, coloured cards, scissors and marker pens
- Hand-outs Nos 1 and 2, course timetable and description

### Prepare:

**Two** flip charts for hopes and concerns, **or** four pieces of flip chart paper with an outline of a tree, including grass and sky, and five different coloured papers cut into strips 1

## Key points and information

Let learners write the name they want to be called by on a blank card with a marker

Start the session with some simple introductory questions, asking people to be brief

If the learners come from different countries, a round of each person saying hello and naming each person in the room can assist them to learn each other's names, although it takes longer to conduct

Select an exercise that moves learners from their seats so that they can meet others

Explain that the exercise helps the educator to get to know the learners

Write up and give clear instructions

**The length of the session and number of exercises depends on the length of the course.** For example, for a residential course, there should be two introductory sessions, which should include exercises on working in groups and setting up a course committee

Conduct the exercise before describing the course content and objectives

Use the results of the exercise on expectations to fine tune the objectives and sessions

## Plan and exercises

### Introductions

Write a list on the board or flip chart for reference: e.g.

Name/union/position in union/sector/country or region/first language

Ask for a volunteer to start the process

🕒 (10 minutes)

### Spectogram

▶ Instruct learners to move around the room and ask each other the length of time they have been union activists, and then form a line that goes from the most to the least experienced

To begin the process, assist people by establishing the time frame, identifying who has the least and most experience with a show of hands. When the line is in place

▶ Ask them to fold the line so that people with most experience are opposite those with less experience, and discuss why they became union activists

▶ Divide the two lines into groups of four and ask them to share how they became union educators

▶ Finish with a plenary discussion to compare experiences

🕒 (20 minutes)

### Hopes and concerns

Put up the two flip charts with the headings 'hopes' and 'concerns'

▶ Give out coloured post-it notes

▶ Ask people to write their hopes (expectations) and concerns (fears) on a post-it

▶ Ask people to stand around the 'hopes' flip charts and take it in turns to paste notes on the chart and briefly explain them. Do the same with the 'concerns' flip chart

🕒 (20 minutes)



Key points and information	Plan and exercises
<p><b>Explain the course aim and objectives, methodology, timetable and evaluation</b></p> <p>Describe the:</p> <ul style="list-style-type: none"> <li>▶ Tasks or presentations and the review and feedback processes</li> <li>▶ Administrative procedures</li> </ul> <p>Agree on starting, finishing and break times</p>	<p><b>Linking expectations to course content</b></p> <p>Refer to the responses from the previous exercise and link to the objectives and timetable</p> <p>If the responses are outside the scope of the objectives, explain why and find a way to accommodate them</p> <p>Ask people if they have any questions and discuss</p> <p>🕒 (20 minutes)</p> <p>🕒 <b>TOTAL TIME: 70 minutes</b></p>

**The length of this session is 70 minutes. This allows 20 minutes for a late start or an opening speaker at the beginning of the second session**

**Hand out evaluation sheets and ask learners to fill them in each day or give each learner a small notebook and ask them to write up a diary of the course each day to assist them in the course evaluation.**

**Alternative exercise to ‘spectogram’ and ‘hopes and concerns’**

*This exercise is longer and would not allow time for a long welcome address by a speaker.*

<p><b>The tree of union experience</b></p> <p>This exercise creates the opportunity for learners to find out more about each other. It also allows the educator to identify the level of peoples’ experience.</p> <p>The educator sets time limits for each section of the exercise to ensure that it is kept to the allocated time.</p>	<p><b>Explain that:</b></p> <ul style="list-style-type: none"> <li>▶ The exercise assists in exploring the different experiences of learners in the trade union movement and sharing them collectively</li> <li>▶ It constructs a visual picture of these experiences in the form of a tree, building from the roots to the leaves and flowers, demonstrating how individual experience grows</li> <li>▶ Everyone contributes individually to the tree and shares experiences in the plenary</li> <li>▶ There are six stages. The sixth stage is completed during the final evaluation, as flowers.</li> </ul> <p>🕒 (5 minutes)</p>
--	---

## Key points and information

Before the session, fix the flip charts with the outline of the tree to a wall with enough space for people to stand comfortably around it.

Select different coloured paper strips, markers and post-it notes for each stage of the exercise and place them on a table near to the wall with the outline of the tree.

For each stage, give people **three minutes** to write on the strip of paper and paste it on the tree, and allow 10 minutes to share the different contributions.

Keep learners around the tree for the whole exercise.

**If there are people with different languages, write each task on a card and hold it up while saying it.**

## Plan and exercises

### 1. The roots

*Ask people to:*

- ▶ **Recall a key moment, event or person that persuaded them to join a trade union**
- ▶ Write it on a strip of paper in two or three words and paste it along the roots of the tree
- ▶ Stay around the tree and explain briefly what they have written on their cards (ask probing questions if necessary)

🕒 (15 minutes)

### 2. The trunk

*Ask people to:*

- ▶ **Recall a workplace event that influenced them to become active in the union**
- ▶ Write it on a strip of paper in two or three words and paste it in the trunk of the tree

Plenary discussion

🕒 (15 minutes)

### 3. The branches

*Ask people*

- ▶ **To recall a situation that created an interest in union education for them**
- ▶ Write it on a strip of paper in two or three words and paste it along the branches of the tree

Plenary discussion

🕒 (15 minutes)

### 4. Rain drops and leaves

*Ask people*

- ▶ **One thing they can contribute to the course (rain drops)**
- ▶ **One thing they want to learn from the course (leaves)**
- ▶ Write them on different coloured post-it notes and paste them on the tree as leaves or raindrops

Short plenary sharing

🕒 (10 minutes)

Key points and information	Plan and exercises
<p><b>Summarize by raising the following:</b></p> <ul style="list-style-type: none"> <li>▶ <b>Union education is about building on peoples experience</b></li> <li>▶ <b>everyone comes with life experiences</b></li> <li>▶ <b>exercises need to draw on and use those experiences</b></li> </ul>	<p>Add up everyone's ages to demonstrate the total number of years of experience in the course.</p> <p>Summarize</p> <p>🕒 (5 minutes)</p> <p>🕒 <b>TOTAL TIME: 60 minutes</b></p>

Continue by explaining the course aim and objectives, timetable, methodology, administration and evaluation sheet or notebook, as above (20 minutes)



## SESSION TWO

### Union education today

 1 ½ Hours



#### Aim:

- ➔ To share experiences about the context in which union education is provided today

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Identify key challenges facing workers and their families and their impact on unions and workers today
- ➔ Share union achievements in dealing with these challenges over a period of time
- ➔ Analyse the role of education in supporting unions to deal with the challenges

#### Materials:

- ☒ Flip charts and paper, board and markers, coloured cards
- ☒ Introduction, Section B, 'Educating for strength'

#### Prepare:

(1) flip chart papers for the time line; (2) provide cards, markers and tape for pasting on the wall

## Key points and information

Explain aims and objectives

The purpose of the exercise is to encourage learners to analyse the role that education can play in a union's programme of action

Select an empty part of a wall with space for learners to place cards and stand around to discuss issues

Prepare a stack of different coloured cards, and provide blue tac or masking tape. Groups/individuals can write on the cards, paste them on the wall and move them around as agreed by them

Place a flip chart near the wall and provide different coloured marker pens

Prepare a line of three flip chart papers along a wall with a horizontal line drawn in the middle

## Plan and exercises

### Search conference

Divide the learners into two groups (if there are more than 20, divide them into three groups)

### Step 1: Challenges facing unions

*Ask each group to:*

- brainstorm **the key challenges (positive or negative) facing workers, families and communities today**
- Write each issue on a separate card
- Come to the wall and paste the cards in a column on the allocated wall space

*In plenary, ask the learners to:*

- Spend a minute reading the other group's cards
- Double up repeat cards
- Form the cards into categories, giving each category a name
- Remain standing around the wall

Begin a plenary discussion on the main causes of these challenges and list them on a flip chart as they are raised

🕒 (30 minutes)

### Step 2: Dealing with the issues

*Ask people to:*

- Form themselves into small groups, making sure that there is a mix of unions/sectors/countries in each group
- In these groups, share **what unions are doing and identify some achievements**

Ask people in plenary to share the union actions that improve the lives of workers and their families.

List these issues on a flip chart.

🕒 (20 minutes)

## Key points and information

If there are more than 20 learners, the analysis can be carried out in two groups, each with an educator

Facilitate learners to identify the role that education played in the achievements

The time line may indicate that the challenges facing unions are more complex, but that education has decreased, thereby identifying the need for education on a regular basis. If this is not the case, reinforce the positive aspects of union education.

## Plan and exercises

Step 3: Union progress and the role of education

Create an historical time line

Facilitate the group to find out the person with the longest experience of working in a trade union

Divide the flip chart into years, starting with the year the person with the most experience started working in a union and ending with the current year

*Ask people in plenary to:*

- ▶ Take the cards from the wall and place them above the time line approximately when the challenge started
- ▶ Write underneath the line the list of union achievements and actions, approximately when they took place
- ▶ Analyse the time line

*Questions to ask to facilitate the discussion*

- ▶ What pattern is emerging from the time line?
- ▶ Are union achievements increasing or decreasing?
- ▶ Is there a change in the type of challenges over the years?
- ▶ How have unions grown over the period?
- ▶ Has the level of union skills and knowledge changed over the years?
- ▶ What role has education played? Has it changed?
- ▶ What could the reasons be for the change?

Write up the responses on the time line. Highlight the role and importance of education programmes.

🕒 (40 minutes)

🕒 **TOTAL TIME: 90 minutes**



## SESSION THREE

# Communicating with learners

 1 ½ Hours



### Aim:

- ➔ Educators demonstrate a link between communication and learning when preparing and conducting a session

### Learning objectives: at the end of the session learners will be able to:

- ➔ Apply a communication model to planning and conducting a session
- ➔ Explain the importance of two-way communication and obtain feedback from learners
- ➔ Discuss ways of dealing with communication breakdowns and problems that can occur during a course

### Materials:

- Flip chart, board and markers
- Hand-out No. 3, task sheet with scenarios (example attached)

### Prepare:

(1) exercises to use for the model; (3) a presentation with a visual aid on working with learners, p.6; (4) for alternative exercise 2, task sheets for group work, or write the tasks on a flip chart paper to be revealed before the task

Key points and information	Plan and exercises
<p>Explain the aim and objectives using a visual aid.</p> <p>Remember you are demonstrating what you are asking people to learn.</p> <p>Link the words to the different parts of the model during the presentation</p> <p>Select short exercises for (1) encoding, (2) perceptions and (3) listening</p> <p>Make sure that the exercises are relevant to the target group</p> <p><b>Summarize by linking the parts of the model to the words noted on the board from the first exercise</b></p>	<p>As an introduction to the topic, ask people to</p> <ul style="list-style-type: none"> <li>▶ Think about the word ‘communication’ and note down two words they associate with it</li> <li>▶ In pairs, discuss the words and why they were chosen.</li> </ul> <p>Ask each pair in turn to choose one word and write it on the board. When all the pairs have written a word on the board, ask the learners to call out any other words not included on the board</p> <p>🕒 <b>TOTAL TIME: 10 minutes</b></p> <p>Draw the model on the board explaining each part (see Hand-out No. 3)</p> <p>During the presentation, use three short exercises to demonstrate how barriers can be set up, for example:</p> <ol style="list-style-type: none"> <li>1. Ask people to draw two rectangles and read out complicated instructions quickly without looking at people - do not allow talking or questions (encoding)</li> <li>2. Hand out a cartoon and ask learners to note down their first reactions or perceptions, then share and note the differences (perceptions)</li> <li>3. Use a simple listening exercise, such as ‘Chinese Whispers’</li> </ol> <p>After each exercise, facilitate a brief discussion relating it to the model and the lessons learnt for the educator</p> <p>🕒 <b>TOTAL TIME: 20 minutes</b></p>

There are **two alternative exercises** for the last 60 minutes of the session. The first exercise provides experience of working with feedback, and the second is a case study on working with situations that create barriers to communication and learning.

**The choice of the exercise** will depend on the level of experience of the learners and the time available. If there is very little experience in using active learning techniques, or the potential for tensions in group work, use the feedback exercise.



### Alternative 1: Feedback

Key points and information	Plan and exercise
<p>Explain that the purpose of the exercise is to examine how people communicate in groups and how an active learning method can give the educator feedback</p> <p>Facilitate the discussion with plenary questions, such as:</p> <ul style="list-style-type: none"> <li>▶ If you were running a session, for example on ‘working in groups’ or ‘working collectively in preparing for negotiations’, what could the feedback from the exercise tell you?</li> <li>▶ What could go wrong with the exercise, and how would you deal with it?</li> <li>▶ As an educator, how can you handle learners that disrupt a session or group work? Ask for the experiences and how people have dealt with similar situations.</li> </ul> <p>Summarize with a five minute presentation on working with learners</p>	<p><b>The feedback exercise</b></p> <p>Divide the learners into two groups.</p> <p><b>Explain</b> that each group will prepare a short demonstration role play (5 minutes) without words (miming), to be performed to the other group. The second group will then guess what type of communications are being demonstrated.</p> <p><b>Task</b></p> <ul style="list-style-type: none"> <li>▶ <b>Group 1</b> is asked to select and demonstrate <b>the type of communication skills that assist a group to work well together</b></li> <li>▶ <b>Group 2</b> is asked to select and demonstrate the <b>type of communication skills that prevent a group from working constructively</b></li> </ul> <p>After each demonstration, facilitate a discussion about the communication skills demonstrated and how the educator can build two-way communication into a session and link it to the communication model.</p> <p>🕒 <b>TOTAL TIME: 60 minutes</b></p>

### Alternative 2: Working with learners

<p>Give a short presentation (five minutes) on the role of the educator when working with learners</p> <p>Focus on observing how learners react to situations and the need to establish a positive learning environment</p> <p>Write a task sheet with a different problem scenario for each group, using the problems from ‘Check whether’ on page 6 of Hand-out No. 3 (see example below).</p> <p>Hold a plenary discussion asking people to share how they resolved the problem. Ask probing questions if the ideas do not seem appropriate.</p>	<p><b>Working with learners - small group work</b></p> <ul style="list-style-type: none"> <li>▶ Divide the learners into three or four small groups, keeping them in their seats</li> <li>▶ Hand out the task sheet and allocate one or two problem scenarios to each group</li> </ul> <p>Ask each group to facilitate a discussion on ways of handling difficult situations in a session drawing from learners’ experience, either as educators or participants and prepare to report back in the plenary.</p> <p>🕒 <b>TOTAL TIME: 60 minutes</b></p>
---	--

## EXAMPLE

## Task sheet

***In your groups:***

- \* Work with the scenario allocated to your group
- \* Discuss what you think may be the cause of the problem, and decide how the educator could deal with it
- \* Prepare your response briefly on a flip chart

**The scenarios**

1. You are an educator conducting a three-day training course for new shop stewards on representing members at the workplace. It is the last session on the first day of the course and one older person who has more experience than the others is dominating all the discussions, and some of the interventions are not factually accurate or relevant to the topic. The other learners are looking bored.
2. You are an educator conducting a two-day course on union gender equality policies and strategies for branch officials. Only 20 per cent of the learners are women. In the first session, which explores gender equality definitions, a few of the men begin making sexist and stereotypical comments. The women are visibly upset, but lack the confidence to raise the issues.
3. You are an educator conducting a one-day introduction to the union workshop for young workers from call centres. After the introductory session, two people begin walking in and out of the room talking on their mobile phones. This is distracting for the other people.



# SESSION FOUR

## Using visual aids

 1 ½ Hours



### Aim:

- ➔ To assist educators to prepare and use visual aids in sessions in support of learning processes

### Learning objectives: at the end of the session learners will be able to:

- ➔ Select and plan different types of visual aids for the right learning situation
- ➔ Prepare visual aids that are clear, relevant and do not distract from the objectives
- ➔ Use equipment confidently

### Materials:

- Flip chart, board and markers, computer, screen and a Power Point presentation
- Hand-out No. 4.

### Prepare:

A presentation from the hand-out that demonstrates each visual aid

## Key points and information

Explain the aims and objectives of the session with a visual aid, and link to the communication session

Demonstrate the visual aid as you describe it

Summarize by explaining that using visual aids need practice

During the presentation refer to the list on the board from the first exercise

Raise the issues of cost, availability of power and Internet, and ease of use

Emphasize that it is a one-way form of communication

Write the list of situations on the board

Describe how to select the correct visual aid for the objectives, target group and message

For the buzz groups, write the points on the board and facilitate plenary responses

## Plan and exercises

### Plenary questions to share experiences

- ▶ Ask people to brainstorm the visual aids they have used or seen used. List them on the board
- ▶ Facilitate a discussion on positive or negative experiences with visual aids as educators and learners
- ▶ Write key points on the board, dividing them into positive and negative
- ▶ Ask people what they think might cause the points to be positive or negative and discuss

🕒 **TOTAL TIME: 15 Minutes**

### Plenary information and discussion

- ▶ Explain the different types of visual aids as you use them, and invite input from the learners
- ▶ Compile a list of do's and don'ts on the board for each visual aid
- ▶ Discuss the educator as a visual aid

🕒 **TOTAL TIME: 45 minutes**

### Buzz group exercise in threes or fours

- ▶ Ask people to discuss what type of visual aids they would use in the following situations:
- ▶ A group of 30 people
- ▶ A small crowded room
- ▶ In a power cut
- ▶ A group with a low level of literacy
- ▶ Tables and detailed information

🕒 **TOTAL TIME: 30 Minutes**



# SESSION FIVE

## Activists as learners

 **1 ½ Hours**



### Aim:

- ➔ To introduce educators to some basic principles of adult learning in order to assist them to plan a session.

### Learning objectives: at the end of the session learners will be able to:

- ➔ Describe how adults learn and identify barriers to learning
- ➔ Explain some basic principles of learning
- ➔ Use the principles when planning a session

### Materials:

- Flip chart, board and markers, computer, screen and a visual aid
- Hand-out No. 5

### Prepare:

(1) a flip chart with two columns, (2) a presentation on learning principles with a visual aid

**Key points and information**

Explain the aim and objectives

The session begins with learners' experiences, and some basic principles and barriers to learning are then introduced

Write the question on the board and label the columns positive and negative

Ask people to remain standing around the flip chart for the discussion

**Alternatively**, for a 60 minute session, ask the groups to remain seated and share their points. Write them on the board in two columns

Explain that all adults learn differently and that trade union activists have specific characteristics to be factored into the learning situation

*For example, issues that should be covered include:*

- ▶ Strong political views
- ▶ The drive to see changes and action
- ▶ Negative experiences at the workplace
- ▶ Lack of access to education in many cases
- ▶ Experiences of exploitation and a belief in justice and rights

After each principle, ask the learners how they could apply it in a session, and write up the responses

Give examples from Hand-out No. 5

**Plan and exercises****Individual and small group exercise**

Write the following question on the board:

***What are the things you have learnt as an adult in a structured or workplace situation?***

*Ask people:*

- ▶ In pairs, to share and compare these experiences
- ▶ Discuss what made it difficult or easy to learn, and note down a positive and a negative point
- ▶ When you have the points, go to the flip chart and write your responses in the negative or positive columns, or tick a similar response

Facilitate a discussion to clarify the responses and invite people to share their experiences

Ask people to **brainstorm the characteristics of a trade union activist**, for example, background, experience and motivation

- ▶ Write the responses on the board
- ▶ Facilitate a discussion on how an educator can prevent these becoming a barrier to learning

*For example*, involving people in the sessions with exercises and tasks, showing respect, not disempowering people

🕒 (45 minutes)

**Presentation on learning principles with short exercises**

Use four short exercises to demonstrate some of the principles (see the examples below)

After each exercise, hold a discussion to identify what educators can do in a session to prevent barriers to learning

🕒 (45 minutes)

🕒 **TOTAL TIME: 90 minutes**

***The session can be shortened to one hour by using only two exercises.***

EXAMPLE

## Examples of short exercises

### Overlearning

- \* Ask people to recall a song sung to them as children and discuss why they can still recall it
- \* Note the answers on the board and ask what can be done in a session to encourage overlearning

### Active learning

- \* Write a list of exercises on the board (video, written test, group discussion, dictation, lecture, role play)
- \* Ask individuals to prioritize them from (1) 'the most active' to (6) 'the least active', and to note down the numbers.
- \* Ask people what numbers they have and facilitate a discussion on what is meant by 'active' in an exercise

### Meaningful materials

- \* For one minute, talk about a very large demonstration of 500,000 people. Do not mention the number, but give some clues
- \* Ask the learners how many people they think attended the demonstration
- \* Note the differences in responses, and ask people how they could have described the demonstration to make the size meaningful. For example, 'the demonstrators could have filled a football field'.

### Primacy and recency

- \* Read out a statement with a few ideas. Repeat one idea at the beginning and at the end
- \* Ask people to note down what they remember from the statement
- \* Compare the answers (learners do not usually remember the ideas expressed in the middle of the statement)



## SESSION SIX

### Learning objectives

 1 ½ Hours



#### Aim:

- ➔ To encourage educators to write learning objectives for all sessions and education activities

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Explain the benefits of writing learning objectives for a session
- ➔ Describe how to bring about change in peoples knowledge, skills, attitude and behaviour (KSAB) in a training session
- ➔ Write learning objectives for specific target groups which refer to union needs

#### Materials:

- Flip chart, board and markers, and equipment for the visual aids
- Hand-outs Nos 6(a), (b) and (c)

#### Prepare:

(1) flip chart with the aim and objectives of the session; (2) a presentation with visual aids for Hand-out No. 6(a); (3) a presentation with different visual aids for Hand-out No. 6(b)



## Key points and information

Use the aim and objectives for this session as an example

Explain that objectives are written before planning a session and take into account the target group and the tasks that people perform for the union

Facilitate a discussion after each question and note the points raised on the board

Explain that union education supports people to fulfil their roles in the union and that all union activists need the knowledge and skills to deal with issues

Summarize the exercise by linking it to the points raised in the presentation, and emphasize the importance of relevance to both the union and the position holder

Give examples during the presentation

Explain the difference between active and passive verbs, with examples using the list on the board, and invite people to provide other examples

Highlight the active words

## Plan and exercises

Briefly explain the reasons for writing learning objectives

🕒 (5 minutes)

**Presentation 1: Different kinds of learning**

Ask one question at the beginning of each point on reinforcing KSAB

1. What helps us to remember information?
2. What helps us to use a skill competently?
3. How do we feel when someone challenges our attitudes?
4. How do we change our behaviour?

Form four groups of learners (without them moving from their places)

Ask each group to

- ▶ Select a card from the wall from the exercise on day one (union education today)
- ▶ Identify the knowledge and skills that will be needed to deal with these issues

Ask each group to read out the knowledge and skills, and record them on the board

🕒 (35 minutes)

Summarize

🕒 **TOTAL TIME: 40 minutes**

**Presentation 2: Writing learning objectives**

Include plenary questions and discussion

Before the section on active verbs, conduct a short exercise

- ▶ Write up a list of active and non-active verbs (e.g. describe, know, write, understand, enjoy, define - see Hand-out No. 6(c))
  - ▶ Ask the learners to note down which verbs they think are active and non-active
- 🕒 (30 minutes)

**Key points and information**

Write a scenario on the board that describes a target group, the name of the session, and time frame

**Ask probing questions about the objectives, for example, whether there is anything the learners would change**

Summarize by explaining that using active verbs helps to focus on the target group and relevant union issues

**Plan and exercises****Small group exercise**

- ▶ Ask people to work in the same groups as in the KSAB exercise
- ▶ Instruct the groups to write one learning objective for the scenario on the board
- ▶ Ask each group to read out their objective and write it on the board
- ▶ Invite people to provide feedback to each other on the objectives written on the board

🕒 (20 minutes)

🕒 **TOTAL TIME: 50 minutes**

🕒 **Total Session time 90 minutes**

**EXAMPLE****Example of a scenario**

*(write on the board or a flip chart)*

Write one objective for a:

- ★ **Session on recruitment**
- ★ **The target group are newly elected shop stewards/local union representatives**
- ★ **The session is for 1½ hours**

Identify the skill or knowledge the learners are expected to have at the end of the session



## SESSION SEVEN

### Planning and using active exercises

 **3 Hours**



#### Aim:

- ➔ To assist learners to plan and use active learning exercises confidently in all sessions

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Select the appropriate type of exercise for a specific learning situation
- ➔ Plan exercises into a session with realistic time frames
- ➔ Explain and use processes for conducting exercises that support learning

#### Materials:

- Flip chart, board and markers, coloured cards and tape, presentation with visual aids
- Hand-outs Nos 7(a), (b) and (c), task sheet (example attached).

#### Prepare:

(1) two presentations with a visual aid on Hand-outs 7(b) and (c); (2) task sheet for the role play

## Key points and information

Introduce the session and explain the learning objectives

Emphasize that short exercises are small activities conducted during a session

Give examples of short exercises conducted in the course so far

The session covers buzz groups, brainstorming, ice-breakers and energizers, and questioning techniques

Use towns, cities or countries as appropriate for the target group

**Prevent any discussion or comments and, if necessary, slow people down to make sure that all the responses are recorded**

**After the plenary discussion, recall how to facilitate and use a brainstorming session**

## Plan and exercises

### Buzz groups to share experiences

- ▶ Ask people why they think it is important to use active learning exercises in a session
  - ▶ Write the responses on the board and facilitate a short discussion to compare and clarify the responses
- 🕒 (15 minutes)

### Demonstration brainstorming exercise

Explain the process.

1. All responses are welcome
2. Think creatively
3. Every response will be recorded
4. There is no commenting on the responses, judgements or discussion during the brainstorming

- ▶ Write the following question on the board: ***What are all the different ways a person could travel from Kuala Lumpur to Bangkok?***
- ▶ List the responses on the board as they are called out, and continue until the responses have stopped

Discuss how to categorize the points on the board and **what type of exercise or presentation can be conducted after the brainstorming**

### Brief plenary discussion on brainstorming

Ask people the following questions

- ▶ How did you feel participating in the exercise?
- ▶ What did the exercise achieve?
- ▶ What could you use brainstorming for in union education?

Facilitate a discussion, and note the points on the board

🕒 (15 minutes)

## Key points and information

Explain that buzz groups are an activity that keeps people in their seats and are quick and useful for obtaining attention and helping people focus on the session

Set up the pairs without moving people from their chairs

Explain that there is never a right answer, this exercise gives people the opportunity to analyse and discuss the meaning of union values. The exercise can be followed with a group task to provide definitions for each word, or can introduce a session, for example, on leadership skills.

Explain the importance of selecting the right type of exercise for the learning outcome, taking into account the time available, the number of learners and the position of the exercise in the session

**Emphasize the difference between short exercises and energizers or ice-breakers, and when they should or should not be used**

## Plan and exercises

### Demonstration of buzz groups with a ranking activity

Divide people into groups of three as they are sitting around the room

- ▶ Write a list of union principles on the board (for example, democracy, collectivism, accountability, transparency, equality, courage, respect)
- ▶ Ask the groups to discuss union values and rank the list of words from one to seven (5 minutes)
- ▶ Ask each group in turn to read out their list
- ▶ Add the numbers to each word on the board as they are read out

Facilitate a short discussion on the reasons for people's choices

### Ask people to think of other issues they could use for the exercise

🕒 (15 minutes)

### Presentation on using and selecting short exercises in a session, using the board as a visual aid (Hand-out No. 7(b))

Use questions to encourage input from learners

🕒 (10 minutes)

### Describe the uses of energizers and ice-breakers

(Hand-out No. 7(a))

Ask if anyone has examples that they have used and request one person to conduct a short energizer

🕒 (15 minutes)

### Short presentation on questioning techniques (asking and responding)

Give examples by asking a closed and an open question, and discuss peoples' responses

🕒 (20 minutes)

🕒 **TOTAL TIME: 90 minutes**



Break

(Ask learners if they would like to have a short break and then to continue the session up to dinner, or to have a longer break and continue after dinner)

Key points and information	Plan and exercises
<p>Describe 'responding to questions', Hand-out No. 7(c)</p> <p>Explain that</p> <ul style="list-style-type: none"> <li>▶ Each group plans and conducts a short exercise to use at the beginning of a session</li> <li>▶ The other group members participate in each exercise</li> <li>▶ Allocate a session topic to each group (e.g. recruitment, negotiating, the role of unions, gender equality)</li> </ul> <p>After both groups have conducted their exercise, debrief and then facilitate a plenary discussion on how people felt, what worked well and what could be improved</p> <p><b><i>If the group is larger than 16 learners, divide each group into two sub-groups to conduct the role plays and ensure that there is another room and educator</i></b></p>	<p><b>Responding to questions</b></p> <p>Give a short presentation with examples ⌚ (10 minutes)</p> <p><b>Writing and conducting an active exercise (role play)</b></p> <ul style="list-style-type: none"> <li>▶ Give out the task sheet (see below)</li> <li>▶ Divide learners into two groups, depending on their numbers</li> <li>▶ Ask each group to read the task sheet and follow the instructions</li> </ul> <p>Preparation time: 30 minutes            Conducting the exercise: 10 minutes            Review and feedback: 10 minutes</p> <p><b>Summarize and give out Hand-out 7(c) (10 minutes)</b></p> <p>⌚ (60 minutes)</p> <p>⌚ <b>TOTAL TIME: 70 minutes</b></p> <p><b>The exercise can be shortened by allowing 20 minutes for preparation and five minutes for conducting the exercise</b></p>

EXAMPLE

## Task sheet example

The purpose of the task is to practice writing and conducting a short active learning exercise

**The task:** In your nominated groups with the allocated session topic:

- \* Select a buzz group or brainstorming exercise to use to introduce the session
- \* Write questions for the exercise
- \* Nominate people in your group to conduct the exercise
- \* Use a board or flip chart to record the responses
- \* Conduct the exercise using the other group members as the learners

**Preparation time 20 minutes You have ten minutes to conduct the exercise**



## SESSION EIGHT

### Planning a session

 1 ½ Hours



#### Aim:

- ➔ To encourage educators to prepare and write session plans based on the learning objectives

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Design a session plan with a logical flow that is relevant to the target group
- ➔ Select content that is important to meet the learning objectives
- ➔ Include exercises and tasks in the session plan which assist learners to practice the relevant knowledge, skills, attitude and behaviour (KSAB)

#### Materials:

- Flip chart, board and markers, coloured cards and tape, or 'Blu Tack'
- Hand-out No. 8.

#### Prepare:

(1) a presentation with a visual aid from Hand-out No. 8 (without the eight steps); (2) a set of coloured cards, pens and tape for each team; (3) write the eight steps on a flip chart



Key points and information	Plan and exercises
<p>Explain the learning objectives</p> <p>This session brings together the information and skills from the previous sessions, and provides practice in planning a session</p> <p>The exercise needs a large space so that the two teams can stand apart at the same distance from a wall, for example in a corridor or outside space</p> <p>Do not start discussion after the recall exercise. Tell the teams that they will return to the cards later in the session</p>	<p><b>Recall exercise</b></p> <p>Explain that the exercise is like a competitive brainstorming</p> <ul style="list-style-type: none"> <li>▶ Divide learners into two teams and give each team cards, marker pens and tape</li> <li>▶ Ask each team to stand in the space provided for them and select two people as runners and two as writers</li> <li>▶ Explain that <b>the purpose of the exercise is to recall everything learnt over the past few days</b></li> <li>▶ Team members call out what they recall (with no discussion) and the writers record each item on individual cards. The runners paste them one at a time on the identified wall</li> <li>▶ Set the time frame at five minutes.</li> <li>▶ Call stop and ask everyone to come to the wall</li> <li>▶ Count the number of cards per team and discuss quality - the winner can be decided on the basis of either quality or quantity</li> </ul> <p>🕒 (15 minutes)</p>
<p><b>After the exercise, ask people to return to their seats</b></p>	<p><b>Presentation on planning a session</b></p> <p>Using plenary questions and discussion</p> <p><b>Give examples, and ask learners for their examples</b></p> <p>🕒 (35 minutes)</p>
<p>Not including the eight steps</p>	<p><b>Prioritizing cards</b></p> <p>Ask the teams to group and order their cards (adding more if they need to) into a flow chart for planning a session</p> <p>Review and discuss the two flow charts. Ask the learners to compare the flow charts with the Hand-out and discuss the differences</p> <p>🕒 (40 minutes)</p>
<p>Ask people to return to the wall</p> <p>Give out Hand-out No. 8 and refer people to the eight steps on the last page</p>	<p>🕒 <b>TOTAL TIME: 90 Minutes</b></p>



## SESSION NINE

### Using film in a session

 1 Hour



#### Aim:

- ➔ To encourage educators to use different types of film to support learning

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Recognize the important role that film can play in the learning process
- ➔ Plan exercises and tasks to create active participation.

#### Materials:

- Flip chart, board and markers, computer, screen and DVDs
- Hand-out No. 9.

#### Prepare:

(1) research and select a short inspirational film; (2) write the discussion questions on the board or flip chart

### Key points and information

As this is an evening session, the educator demonstrates the process by showing a film and facilitating an exercise

Explain that using guest speakers is also included in the hand-out for this session

Introduce the film using the points on p. 5 of Hand-out No. 9

Make sure the equipment is in working order and test it before the session

Give out the hand-out and ask learners to read the section on using guest speakers

**An example of a short film is 'The story of Stuff', which can be found on YouTube or at [www.thestoryofstuff](http://www.thestoryofstuff). There are several 20 minute films with different topics, using cartoons**

### Plan and exercises

#### Plenary questions to share experiences

Explain the definition of 'film' (see the hand-out)

Ask people what type of 'film' have they seen used in a session, and discuss how it was used

Briefly explain the key points from the hand-out

🕒 (10 minutes)

#### Film and discussion

- ▶ Introduce the film

- ▶ Show the film

- ▶ Facilitate a discussion around the questions

Summarize the importance of research and of ensuring that the film is relevant for the target group

🕒 (50 minutes)

🕒 **TOTAL TIME: 60 minutes**



## SESSION TEN

### The role of the union educator

 1 ½ Hours



#### Aim:

- ➔ To provide an opportunity for union educators to reflect on their role in the union

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Discuss the challenges experienced by union educators and analyse the reasons for those challenges
- ➔ Identify ways of dealing with the challenges
- ➔ Develop a self-evaluation check list

#### Materials:

- Flip chart, board and markers
- Hand-outs Nos 10 and 7(b); Introduction, Part B, p. 13

#### Prepare:

Make a space in the training room for people to sit in a circle away from the desks

## Key points and information

**Ask the group to move their chairs away from the desks and indicate a space in the training room for them to form a circle. This can be inside the U of desks or in a separate space in the training room**

This session provides an opportunity to reflect on the role of the educator and does not include any presentations

Explain the aim and objectives of the session

**Emphasize that there is no standard role for educators, and that it is determined by the union, policies, structure and finances**

Facilitate the discussion by making use of probing questions to put the experiences into a context (e.g. What was happening at the time? Who else was involved? Was the experience positive or negative?)

Discuss the differences between

- ▶ An appointed education officer and an activist educator (an elected official or member of the union)
- ▶ An educator who has other responsibilities in the union, or is a member educator

## Plan and exercises

### Sharing and reflection exercise

- ▶ Ask the learners to share why they became union educators, and who or what influenced them
- ▶ Facilitate a brief discussion
- 🕒 (10 minutes)

Explain that this session is a discussion and is facilitated by using probing questions.

Use examples of probing questions (Hand-out No. 7(b)) that can assist people to analyse situations

### Reflection exercise

- ▶ Ask individuals to think silently about an occasion/incident, either within the union or when conducting a session, that challenged their role as an educator (5 – 10 minutes)
- ▶ Invite people to share the incidents and encourage others to ask probing questions to identify how the person feels about the occasion and what could have caused it

Distinguish between responses about:

- ▶ The role of the educator in the training room
- ▶ The role of the educator in the union structure

Compare the differences in the responses and explore any similarities

🕒 (40 minutes)

Ask people to share how the role of educators is structured in their union and the specific challenges that they face

Compare the differences between the responses and explore the causes of the challenges

## Key points and information

Summarize by explaining that the method gives time for learners to reflect on personal issues that impact on their work and to find ways of dealing with these issues

Similar exercises can be used for shop stewards or leaders when there is a need to question attitude and behaviour over a specific issue, such as gender equality

**The timing of the different parts of the session are only approximate. If a discussion is particularly interesting for learners, the educator should decide whether to continue it and shorten another part of the session. It is not advisable to cut off a discussion in which people are actively involved, but the educator can shorten a discussion if the same points are being repeated.**

## Plan and exercises

Identify people who are employed by the union, who are elected officials, who have more than one role in the union or are member educators

- ▶ Facilitate a discussion about how these challenges can be dealt with by the union or the individual educator
  - ▶ List ideas on the board under the headings 'union' and 'educator'
- 🕒 (20 minutes)

### Reviewing the method

Ask people to share what they liked or did not like about the method

Explain that this is the type of exercise that can be used to change attitudes and behaviour

Ask people if they noticed a difference between sitting in the circle and sitting behind the desks, and explore

### Self-evaluation

Ask the learners to write a check list individually of how to improve their role as educators and the role of education in the union.

- ▶ Encourage them to share their lists with each other after the session
  - ▶ Ask them to make copy of their list to give to the educator
- 🕒 (20 minutes)

🕒 **TOTAL TIME: 90 minutes**



## SESSION ELEVEN

### Using role play and case studies

 **3 Hours**



#### Aim:

- ➔ To assist educators to plan, write and conduct a simple role play in a session

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Select the correct type of role play for a specific learning situation
- ➔ Plan and write a short role play with a scenario or case study
- ➔ Process the role play with debriefing and feedback

#### Materials:

- Flip chart, board and markers, visual aids and equipment
- Hand-outs 11(a) and (b)

#### Prepare:

(1) presentation 1: types of role play, with a visual aid; (2) presentation 2: planning and conducting a role play; (3) write instructions for the demonstration role play on the board; (4) prepare the role play task sheet for the two groups

## Key points and information

Explain the aim and objectives

Start the session with an energizer that demonstrates how and why energizers are to be used

**If there is no experience among learners of using or participating in a role play, start with the demonstration role play before giving the presentation**

Link the presentation with the list based on learners' experiences

Link to the processing of the demonstration role plays and the practice sessions with the presentation

### ***Give out the hand-outs***

Explain that the purpose of the exercise is to practice conducting and debriefing a role play

*If the course has more than 18 learners, divide each group into two sub-groups. One educator will work with each group*

## Plan and exercises

### Energizer

Select a short team-building energizer, or ask someone to conduct one they are familiar with

### Sharing experiences

- ▶ Ask who has had experience of using or participating in role plays and would like to share the type of role plays they have used or participated in
- ▶ Note the different types of role plays on the board for reference during the presentation

🕒 (20 minutes)

### Presentation 1: types of role play

Introduce the different types of role play, giving or asking for examples

### Demonstration/fishbowl role play

Conduct a fishbowl role play to use as an example of introducing and processing a role play (see example below)

After debriefing, ask the learners the type of situations in which they could use this role play

🕒 (25 minutes)

### Presentation 2: Planning and conducting a role play

Give the presentation, with questions and examples of a written scenario and task sheet


Emphasize the importance of debriefing and feedback

🕒 (30 minutes)

### Introduce the role play task

- ▶ Divide the learners into two groups
- ▶ Hand out task sheets to each group (see below)



Key points and information	Plan and exercises
<p>Allocate space for each group to prepare. If the groups are sub-divided, two <b>rooms will be needed</b> to conduct the role play</p>	<p><b>Explain the time frame</b></p> <ul style="list-style-type: none"> <li>▶ 30 minutes preparation</li> <li>▶ 5 minutes to introduce the role play</li> <li>▶ 15 minutes to conduct the role play</li> <li>▶ 10 minutes for debriefing and facilitating feedback</li> </ul> <p>🕒 (15 minutes)</p> <p>🕒 <b>TOTAL TIME: 90 minutes</b></p> <p><b>Ask groups to start preparation at 14:00 and to be ready to commence role plays at 14:30</b></p>
<p> <b>Lunch break</b></p>	
<p>Set up the spaces in the training room/s</p> <p>Monitor the groups to ensure there are no problems and assist if necessary</p> <p>Keep to strict timing</p> <p>The educators observe the role plays and take notes for feedback</p>	<p>Before starting the role plays, remind learners to introduce and debrief, and that the educator will indicate when they have five minutes to finish the role play</p> <p>🕒 (60 minutes)</p> <p><b>Review of the exercise</b></p> <p>When all the groups have conducted their role play, bring them back into the plenary</p> <p><i>Ask people</i></p> <ul style="list-style-type: none"> <li>▶ How they felt conducting the role play?</li> <li>▶ How they felt participating in the role play?</li> <li>▶ Was there anything they would have done differently?</li> <li>▶ What did they learn from the exercise?</li> </ul> <p>Give feedback and note general points that could be improved</p> <p>🕒 (30 minutes)</p> <p>🕒 <b>TOTAL TIME: 90 minutes</b></p>

 **Take a 30 minute break and then introduce task 3 at 16:30**

## EXAMPLE

**Example of a fishbowl role play****Session: Introducing negotiation techniques for newly elected shop stewards**

**Purpose:** to create a negotiating experience that highlights the difference between bargaining as an individual and negotiating to represent union members

**The educator**

- \* Explains the purpose of the exercise and how it will be conducted
- \* Recognizes that people bargain in their daily lives for goods or services and that, although there are similarities with union negotiating, there are also important differences
- \* Asks for two volunteers to come and demonstrate bargaining for a camera (have a camera for the role play)
- \* Requests them to decide who will be the buyer and the seller
- \* Gives them five minutes to act out the process of buying/selling the camera

If the two people are unable to reach a solution in the allocated time, ask if anyone else would like to try role playing the buyer or seller

After ten minutes, stop the role play and debrief the volunteers, asking them how they felt about participating and clear up any tensions created

Facilitate a plenary discussion on what happened, what worked well and what could have been done differently

Explain that in a session the short role play would be followed by a presentation on the process of union negotiations highlighting the difference in approaches

EXAMPLE

## Example task sheet for writing and conducting a short role play

### Writing and conducting a short role play

#### Group 1 - conducting a meeting of union members

#### Group 2 - recruiting new members

#### *In your nominated groups*

1. Discuss which skill to use the role play for (for example, group 1 - chairing or facilitating a meeting, preparing an agenda in a small committee, time keeping, putting a motion; group 2 - listening, presenting the role of the union, asking questions)
2. Identify and select the type of short role play to use
3. Write a brief scenario and task on a flip chart (including the type of meeting, the participants, the issue, the time frame, the expected results of the meeting)
4. Plan a short role play
5. Allocate roles between group members to conduct the role play
6. Conduct the role play using the other group as learners

#### *You have*

- \* 30 minutes preparation time
- \* 5 minutes to introduce the role play
- \* 15 minutes to conduct the role play
- \* 10 minutes for debriefing and facilitating the learners



## SESSION TWELVE

### Evaluating a session



 3/4 Hour

#### Aim:

- ➔ To ensure educators evaluate the sessions that they conduct and use the information to continue improving the way the session is planned and conducted

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Describe what is evaluated during a session
- ➔ Identify and select a type of evaluation to use
- ➔ Develop a check list to monitor the educator's skills, behaviour and attitude during a session.

#### Materials:

- Flip chart, board and markers
- Hand-out No. 11

#### Prepare:

A presentation with a visual aid on Hand-out No. 11

Key points and information	Plan and exercises
<p>Explain aim and objectives</p> <p>Link the responses to the different parts of the presentation</p> <p>Discuss how educators can self-evaluate</p> <p>Set up the groups of three or four so that the learners stay in their seats</p> <p>Summarize by emphasizing the importance of continual evaluation and monitoring of all sessions and of making amendments to sessions to keep improving them</p>	<p><b>Plenary question</b></p> <p>Ask people to recall the type of feedback given during the three main tasks and note on the board</p> <p>🕒 (5 minutes)</p> <p><b>Presentation</b></p> <p>Use plenary questions and discussion during the presentation to draw out people’s previous experience or ideas</p> <p>🕒 (20 minutes)</p> <p><b>Small group exercises</b></p> <p>Ask the groups to</p> <ul style="list-style-type: none"> <li>▶ Design an evaluation flip chart for learners to record their feelings about a session</li> <li>▶ Paste the flip chart paper on the board</li> </ul> <p>Facilitate a short discussion comparing the designs</p> <p>🕒 (20 minutes)</p> <p>🕒 <b>TOTAL TIME: 45 minutes</b></p>





# HAND-OUT 1

## Welcome and introductions

### THIS HAND-OUT COVERS

- ▶ Introductions
- ▶ Ice-breaker exercises
- ▶ Expectations
- ▶ Equality, equity and language
- ▶ Course description, administration and committees

*Establish a democratic and participatory learning environment in the first session of every course*

The methodology used in union education is based on people working together in groups to debate issues and practice skills.

To be successful this approach requires an environment of trust and respect. Learners need to feel secure enough to ask questions and discover new ways of doing their union work, which happens when people feel respected and valued.

Learners often arrive feeling uncertain and apprehensive. They need to know what is going to happen, how it will take place and what is expected of them.

The educator can put people at ease by being open and transparent and treating them with respect from the beginning of the course.

***In all courses and education activities, time needs to be spent on setting the environment. Residential courses need more time because there is greater potential for problems.***

### Equality and equity

Failure to take these union values into account prevents people from learning and contributing.

It is the responsibility of the educator to ensure that there is no discrimination, harassment or power domination in any session or education activity.

*The starting point for integrating equity and equality is during the planning and preparation phases*

**The educator sets the example in the introduction by:**

- ★ Calling people by the name they have indicated for themselves
- ★ Acknowledging contributions without judgement
- ★ Ensuring that women have equal opportunities to participate

- ✦ Listening attentively and asking probing questions if the responses are unclear
- ✦ Avoiding drawing attention to differences, such as language or culture, by showing equal respect to all
- ✦ Not ignoring anyone and responding to all questions

## Language

The language of the course may not be a learner's first language, education levels may differ and the use of certain words and phrases may be offensive. Such situations can cause barriers to learning.

Educators can find out some of this information from registration forms, although more detailed information gained from introductory exercises gives a clearer picture.

The issue of language needs to be clarified, so that people are aware of language differences and asked to factor them in during discussion and exercises.

## Raising union values

Educators can distribute a union or national centre policy statement on equality and equity with the course programme.

The statement can be read out and linked to union principles and ideology.

Learners should be encouraged to raise any behaviour that they find offensive with the educator or the course committee. If the situation is difficult, exercises can be used to facilitate discussion.

## Names

Making sure everyone can pronounce and remember people's names and letting learners choose and pronounce the name they want to be called by demonstrates respect from the beginning.

Putting a printed name card in each place can make people feel uncomfortable and increase their anxiety, as it gives them no choice about what they want to be called, how it is spelt, where they would like to sit or who they might want to sit next to.

Instead, put blank name cards and a marker pen in each place and ask learners to find a seat and **'write the name they like to be called by on the name card in large letters'**. Their own handwriting also gives the name a more personal feeling.



When everyone is seated, the course can begin with a name swapping exercise during which learners repeat each other's names, together with some simple questions about their country, union and position in the union.

## ■ Introductory exercises

### Ice-breaker exercises

An ice-breaker helps everyone to get to know each other. The exercise should move people from their seats so that they can meet as many people as possible.

There are many different types of ice-breakers, but they should not make people feel silly or uncomfortable:

#### **Plan them to be:**

- ★ Short, simple and non-threatening
- ★ Linked to a union or course issue

A longer course can have two ice-breakers, an initial short one that gets people moving about, and a longer one to explore and bring out experiences.

The educator introduces the exercise carefully and writes instructions on the board, checking that the learners have understood. If learners are unclear about the aim or process, the exercise may be unsuccessful and cause unnecessary tension.

*Educators should always participate in this exercise*

*People get bored if exercises go on for too long, so monitor the time*

### Expectations

The educator makes a general analysis of the target group during the planning phase, but does not know the learners individually. An exercise to identify people's expectations helps to find out their reasons for attending the course. Sometimes people's expectations can be very different from the course objectives.

*Expectations can be used to support the evaluation at the end of the course*

Ask individuals to write a word or two in response to a question on a post-it and stick it onto a flip chart. (*What are you personally expecting to achieve from the course?*)

Give each person the opportunity to share their expectations in plenary.

The educator can link the expectations to the course aim and objectives and explain how different parts of the course meet the expectations.

*Any points raised that are not covered by the objectives must be raised by the educator and discussed. If it is not possible to include them, the educator needs to explain why.*

*The Educator sets an example by listening and respecting responses from day one*

## Course description

Hand out the course description and timetable and read through it with the learners. The main points to be emphasized are:

- ✦ ***The purpose of the practice sessions:*** they are not an 'exam', but an opportunity to learn, through constructive feedback
- ✦ ***Learners will not be asked to do anything that has not previously been covered*** in the course.
- ✦ ***Educators are always available for support*** to find materials or answer questions
- ✦ ***Hand-outs for every session will be given out after the session*** as a reinforcement of what has been learnt during the session.

During and after the description, learners are encouraged to ask questions and raise concerns.

## Administration

If learners are worried, for example, about the time each day ends, when they can contact their family or if they will receive reimbursements, they will find it difficult to concentrate on the sessions.

**The educator needs to cover, as appropriate:**

- ➔ Financial issues
- ➔ Access to Internet and phones
- ➔ Shops and free time
- ➔ Travel details
- ➔ Meals and accommodation issues
- ➔ Timing of the programme

Times for starting and finishing the day and for breaks can be discussed with the learners. It helps people to feel they have some ownership of the course.

The educator can ask the learners if they would like to start earlier, or have a long lunch break and work later. The discussion can be facilitated and a consensus agreement reached and written on the board.

## Course committee

In a residential or longer non-residential course, learners can be asked to establish a course committee. This assists people to have a collective input into the day-to-day organization of the course and makes it easier for the educator to respond to issues.

If a learner comes to the educator with a request for a change and it is a collective issue, agreeing to it may cause issues for other people. Suggest that the learner first raises it in the committee or plenary. Only personal issues should be dealt with individually.

### Points to note:

- \* The course committee should be set up by the learners without the educator being present so that they can decide the processes
- \* The educator can provide time during the day for the learners to meet
- \* The committee needs to meet each day and, if necessary, report back any issues to the educator before the first session of the day
- \* Any changes requested or problems raised can then be discussed and decisions made about how to deal with them in plenary.

*Course committees can be informal or formal, depending on what the learners want*





## HAND-OUT 2

### Working in groups

#### THIS HAND-OUT PROVIDES GUIDANCE FOR WORKING IN SMALL GROUPS AND DISCUSSES:

- ▶ Why group work is important
- ▶ How to define a group
- ▶ Working together in a group

Unions have democratic structures and decisions are made by union officials and members at a range of meetings and forums.

Learning to work collectively in groups is important in the context of both the union and of union education. It gives union members and learners a sense of ownership and commitment and engages union activists in the process of learning.

*Individual domination and lack of respect in a group prevents a constructive outcome*

#### *Working effectively in groups strengthens learning and the union because it:*

- ➔ promotes collective action
- ➔ permits the pooling of experience, views and knowledge
- ➔ Ensures a better analysis of problems
- ➔ Increases tolerance and respect
- ➔ Encourages a sense of collective responsibility
- ➔ Gets people involved and active
- ➔ Assists in strengthening self-confidence

### Defining a group

A group exists when a collection of people have the following qualities:

- ➔ **A collective perception**, with shared aims and similar needs
- ➔ **Interdependence**, when members are affected by and respond to any event that impacts on any member of the group
- ➔ **Social organization**, when there are roles and responsibilities, rules (informal or formal) and the group has some status and control over the outcome
- ➔ **Interaction**, through which members are influenced and respond to each other whether they are together or apart

- ➔ **Togetherness**, when group members want to be a part of the group, contribute to its aim and participate in activities.

## Strengthening group work

People often feel uncomfortable working in a group and can behave in ways that prevent the group from working constructively. They may have a common goal, but there can also be individual differences.

Backgrounds and expectations may vary. There may be different levels of interest and experience. People may not understand what to do and may have different ways of dealing with uncertainty.

In the learning situation, it is important for the educator to facilitate a process at the beginning of a course to ensure that people have a clear understanding of how groups are expected to work.

Without clear instructions about group tasks and the type of structure to be established, group members will adopt certain persona that may be counterproductive to working collectively.

## Preparing for group work

Time needs to be spent at the beginning of a course or task discussing how groups work and the types of behaviour and attitudes that assist group members to work well together.

Different types of exercises can be used and their selection depends on the target group and the time available.

The purpose of an exercise is to let the learners set their own ground rules or guidelines for working in a group.

**It is important for the educator not to tell people how to behave, but to use participatory exercises and discussion to let them think it through for themselves.**

*A group that is working well may, for example, be sitting in a circle facing each other and using positive body language*

***People can be asked to respond individually or in pairs to questions, such as 'How would you like to be treated?' or 'What do you not want to happen to you during the course?'***

- \* Learners can write responses individually on post-its, which are then discussed in plenary  
or
- \* The topic can be linked to a plenary discussion on union values  
or
- \* Small groups can be set up to answer the questions  
or
- \* Groups can prepare and act out a mime or a sculpture showing how a group can be seen to be working well or not

**A list can then be developed of acceptable and non-acceptable types of behaviour and attitudes that can become ground rules or guidelines.**

## Working together

***Groups work better when:***

- They can decide for themselves how they want to operate. The educator should give guidelines, but not interfere unless there are serious disagreements.
- There is a 'leader', or someone who takes responsibility for facilitating or chairing the group.

***A formal chair in group work tends to make the structure too rigid and prevents genuine discussion. Advise the groups to share responsibilities, including the role of leader/facilitator.***

***The facilitator who is nominated or volunteers needs to:***

- ➔ Listen actively
- ➔ Respect people's right to contribute
- ➔ Prevent domination
- ➔ Keep the discussion on track
- ➔ Monitor time schedules

***Individuals contribute constructively when they:***

- ➔ **Take responsibility** for their own behaviour
- ➔ **Listen and respect other contributions**, even if they do not agree with them
- ➔ **Keep to the topic** and do not side-track the discussion
- ➔ **Try not to dominate** and make sure that they do not repeat what has been said before, even if it was said in a different way
- ➔ **Be prepared to let ideas go** if they are not agreed to by the majority, and participate in discussion to find alternatives
- ➔ **Participate actively** and take an interest in what is happening
- ➔ **Avoid making critical judgements** about contributions
- ➔ **Do not make personal attacks** that are sexist or racist

***A group that is not working effectively***

- \* Shows tensions and aggressive behaviour
- \* One or two people may dominate
- \* Others may withdraw by saying nothing or leaving
- \* People talk over each other and compete to say the most, or to have the last say
- \* There are arguments about unrelated issues

***In this situation, the educator has the responsibility to assist the group to change behaviour and attitudes. But these situations can be avoided by raising the issue in the introductory session.***





## HAND-OUT 3

### Communicating with learners

#### THIS HAND-OUT DISCUSSES:

- ▶ A communication model and barriers to learning
- ▶ Listening skills
- ▶ Working with learners

In trade union education, communication is more than just ‘getting a message across’. It is:

- ★ A two-way process of which listening, asking questions and responding are an essential part
- ★ How an educator interacts with learners throughout the course or session.

#### A communication model

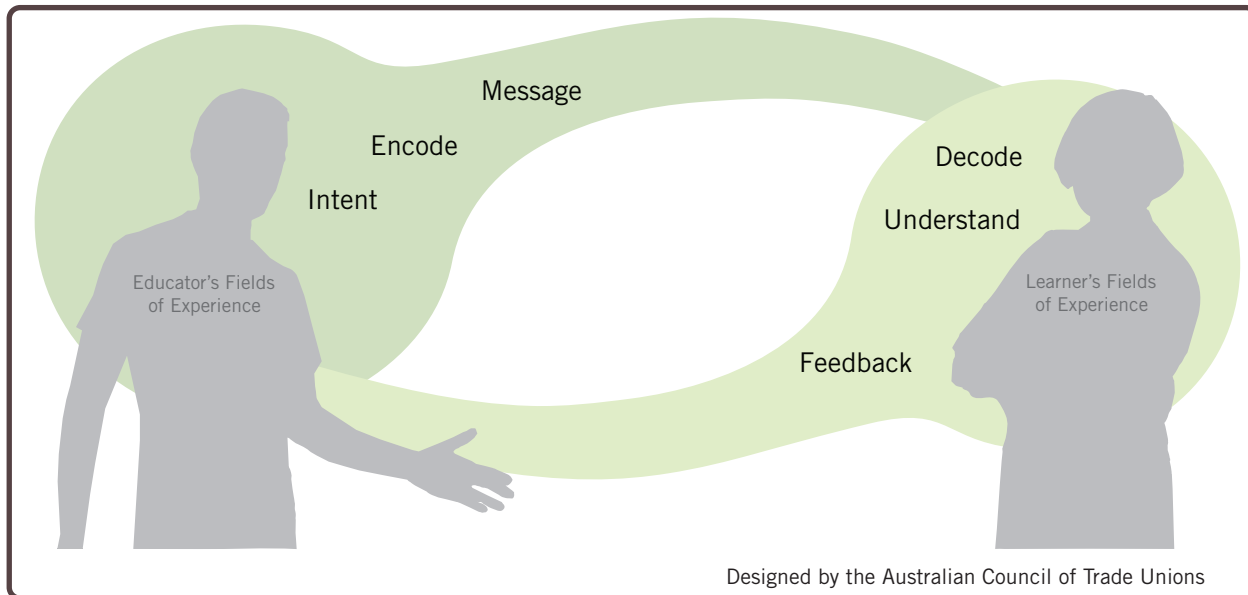
There are many communication models available, but the one outlined below explains the connection with the union education approach.

Each part of the model is influenced by people’s experience or frames of reference, and the context within which their experience has been acquired.

Experience influences how we interpret and understand a message. The experiences of the educator and learners are often different.

Having different experiences means that people will also have different understandings and perceptions of the information that the educator communicates.

*You cannot assume that just because you said it, the learners will understand it*



## The six stages of the communication model:

### 1. The sender

The educator has a purpose that is linked to the learning objectives for which information needs to be communicated to the learners.

Example: explaining the process of negotiating wage increases in the industrial relations system to a group of experienced shop stewards

### 2. The encoding process

The educator decides what content to deliver and how to translate the information into a form that is relevant to the learners.

Example: the information could focus on increasing wages at the workplace level or wage bargaining at the national level, or both. Selection depends on the objectives, the needs of the target group and the time available.

### 3. The message channel

The educator constructs the message and decides how to deliver it: as a presentation with visual aids, a demonstration or through a guest speaker.

Example: the message focuses on wage bargaining at the national level and includes a description of the process and the laws that support it. The channel is a Power Point presentation, with diagrams of the system as a hand-out.

#### 4. The receiver

The learner receives the information and is influenced by the message and the channel chosen by the educator.

Examples of problems in practice: the size of the characters on the Power Point presentation may be too small and may not link well with the diagrams. The presentation may be too long, or the educator may speak too quickly.

#### 5. The decoding process

Learners interpret the information based on their experience and reach their own understanding of the message.

Examples of learner reactions: they may consider the national system as being too complicated, or not agree with the process. It may be the first time they have received this information, or they may have had a bad experience with people from the system.

#### 6. Feedback

The educator then finds out if the learners have understood the purpose of the message and how they have decoded it.

Example: the educator asks questions and finds that the learners are familiar with negotiating at the workplace level, but not at the national level, and have not understood the link between the two. The educator can then clarify the situation and amend the message for the next time.

*If the feedback is negative be flexible and make changes to resolve the problem*

*Think on your feet, be creative or call a break*

### Barriers to learning

If there is a problem with understanding, the educator can use the model as a check list to find out where the problem was.

- ➔ **Was the language too technical, complex, sexist or offensive**, and did it cause people to stop listening or feel uncomfortable?
- ➔ Did the educator **speak too quickly or softly and not face the learners**, so only part of the message was heard?
- ➔ Were the **visual aids a distraction, or not easy to see**, or did they fail to show a clear link with the message?

- ➔ Was ***the environment too cold or hot, or was there external noise***, making people tired and restless?
- ➔ Was the ***level and type of experience or knowledge of the learners misjudged?*** Were cultural issues and education levels factored in?
- ➔ Was there ***sufficient time for questions*** to find out whether the message was relevant and useful?

## To overcome these problems:

- Check that the **message is clear** and that the **correct channel** has been used for the message
- **Explain the intent and purpose clearly** and check that it is what the learners are expecting
- **Check the environment** before the session and try to minimize any problems
- **Observe and check continually** for signs that learners are experiencing difficulties, such as failing to engage or walking out
- **Use a number of different exercises** that encourage feedback
- Make sure that the time spent presenting information without an exercise is **no longer than 15 minutes**

## Listening skills

Listening is an important skill for the educator in all sessions and courses, but is particularly important during the feedback stage of the communication model.

Learners also need good listening skills in practice sessions or group work.

***A listening exercise can be conducted during the session to remind people of the skills needed to be a good listener.***

*Recognize and make allowances for your own biases and prejudices*

*Stereotyping blocks effective listening and is picked up by learners*

## Attending

This means using body language to focus attention on learners, which makes it easier to listen. At the same time, the learners can see that the educator is listening.

The educator needs to consider how to use posture, eye contact, expressions and gestures, *while at the same time making sure that the body language cannot be misunderstood by the learners.*

- \* Face people directly
- \* Lean towards the learner

- \* Adopt an open posture, for example, not folding your arms
- \* Nod as the person speaks
- \* Move closer to the person, while keeping an appropriate distance

Try not to misinterpret body language clues from learners. It is better to check with the person before making assumptions. For example, if someone looks angry, ask them ‘how they are feeling’.

## Paraphrasing

This means restating what someone has said using other words. By doing this, the educator can clarify or put into context what has been said by a learner or group. This is not the same as summarizing.

Example: ‘The lights were red’ can be paraphrased as questions: ‘Do you mean that the lights were a warning to stop’ or ‘Are you saying that the cars were not allowed to go forward, or that they could not go left?’

Paraphrasing tries to keep the intent of what has been said by the learner or groups, and should not be a reinterpretation or a form of judgement.

Linking the red lights to a traffic situation may only be an assumption, in which case the question would be ‘Do you mean red traffic lights?’

***This is an important way of obtaining feedback and making sure that the person has understood correctly. It also gives learners a chance to correct a misunderstanding.***

## Concentration

Speech is about four times slower than the ability to listen. We often use this space to think of something other than the topic of the session. This distracts learners from listening fully to what is being said and reduces the effect of listening.

Example: when a learner is sharing experience about the wages system, the educator may be using the spare time to think about what to do next, instead of noting what is being said and thinking about how to respond.

*The educator can learn to use this time constructively by:*

- ✱ Thinking about what the learner is saying
- ✱ Observing body language to see if the learners are nervous or uncertain
- ✱ Noting the tone of voice or how fast people are speaking
- ✱ Looking for the feeling behind the words: are learners shy, puzzled, angry or frustrated
- ✱ Checking their understanding and, if the message has not been received clearly, formulating questions or paraphrasing

## Working with learners

The educator has a responsibility to establish an environment that is free from unnecessary distractions and conflicts. Being aware of how you are communicating and observing how learners are communicating offers clues on how to minimize problems.

## Observation

Seeing, listening and feeling are all part of observing and help the educator to make an informed decision on how to resolve a problem.

If a problem is misjudged, ignored or handled insensitively, it can escalate and detract from learning.

### *Observe*

- ✱ The way learners are responding or reacting to each other or the educator
- ✱ The level of participation and contribution to exercises and tasks
- ✱ How individuals are dealing with each other, the environment and the social parts of the course
- ✱ The level of understanding of the issues and content.

*Blaming the learners is too easy.*

*Think about how the learners are feeling and first analyse your own attitude, communication skills, course content and methods.*

**Check whether**

- \* Learners are bored - **is the content too easy or difficult?**
- \* The objectives are meeting the learner's expectations - **is the course relevant to them?**
- \* There are constant interruptions - **are they from one or two persons, or everyone?**
- \* Learners are deliberately arguing for no reason - **are they talking over each other, or making inappropriate jokes?**
- \* People are late for sessions or walking out - **is it occasional, or a continual pattern with more than one or two people?**
- \* People are not contributing - **is it a general problem, or are some people shy?**
- \* Sexist language and stereotyping is being used - **how are people reacting and could the issue be raised in plenary?**

*Prevention is the best method.  
Plan carefully and establish a good learning environment from the beginning.*

**Remember**

- \* People may feel defensive about their level of skills or knowledge
- \* They may not want to be there because they have work or family problems, or are anxious about work or child care
- \* Some may not have had exposure to gender equality and equity issues, or are new to union activism
- \* Some may be unsure about revealing a disability.

## Dealing with situations

**First**, reflect on the situation and find out the cause. **Second**, look for options. And, **third**, make a decision about how to change the situation. What works in one course or with one individual may not work for another.

### *Ideas for solving problems:*

- ➔ If there is no obvious reason, wait and give other learners the responsibility for dealing with it. Peer pressure is often more effective than intervention by the educator
- ➔ Give learners the opportunity to deal with it by creating a break in the session, which often diffuses the situation
- ➔ Talk to the person privately and ask them if they are experiencing any difficulties. Find out how they would like to see the issue resolved
- ➔ If the problem involves domination or a conflict within groups, or is related to stereotyping or gender equality, organize a short session on equality or working together in groups. Explain first why you are doing this
- ➔ If the situation involves harassment or discrimination, deal with it decisively. Call a break quickly and speak with the individuals concerned. Make it clear in plenary that the behaviour is not acceptable
- ➔ Prevent domination by drawing others into the discussion. Request contributions on the topic either by asking an overhead question or a specific person if they would like to respond.

*Think before you act*

*Anticipate consequences*

*Use common sense*

*Think how you would like to be treated*

### *Avoid:*

- ✱ Openly isolating a learner, taking sides, drawing attention to an individual in plenary, or manipulating a situation.

***Respect peoples right not to participate. It may be their way of learning.***



# HAND-OUT 4

## Using visual aids

### THIS HAND-OUT DISCUSSES:

- ▶ Different types of visual aids
- ▶ Selection to support learning
- ▶ Ways to use them

*How people absorb information:*

*75% through sight*

*15% through hearing*

*10% through other senses*

Research shows that people absorb information better when they see it than when they hear it.

Educators need to support what they say with visual materials so that learners can ‘see what is being said’.

### Types of visual aids

There are the standard types of visual aids, such as boards, flip charts, Power Point presentations, overhead transparencies, hand-outs and DVDs, although objects and people can also provide visual support.

If there is no electronic equipment or power supply available, the educator needs to think creatively about how to select and prepare information visually.

#### Visual aids need to be:

- \* **Carefully planned** into the session and consistent with the information given
- \* Used to **reinforce key points** only, not a word by word representation of what is said
- \* Used **with discussion**, as visual aids are a one-way form of communication
- \* **Clear, simple and concise**, and not a distraction
- \* **Seen and heard** by everyone

## Selecting a visual aid

The educator needs to select the right type of visual aid for the intended purpose.

A detailed diagram may not be easy to see on a Power Point presentation because the detail is too small to make out from a distance. A hand-out would be more suitable.

### *Ask the following questions to assist selection*

The environment	<ul style="list-style-type: none"><li>▶ How many people are in the group?</li><li>▶ How big is the room?</li><li>▶ Will it be crowded?</li><li>▶ Is there a power supply for equipment?</li><li>▶ Is there outside noise?</li><li>▶ What is the lighting like?</li></ul>
The subject matter	<ul style="list-style-type: none"><li>▶ What is the level of complexity of the information?</li><li>▶ Can it be summarized in key points?</li><li>▶ Does it include instructions?</li><li>▶ Will people want to take it away with them?</li></ul>
Learners	<ul style="list-style-type: none"><li>▶ What are the literacy levels of the group?</li><li>▶ Is anyone likely to have hearing, sight or movement difficulties?</li><li>▶ What is the level of the group's experience?</li><li>▶ Will there be any language problems?</li></ul>
The educator	<ul style="list-style-type: none"><li>▶ What is the educator's past experience with visual aids?</li><li>▶ What is the educator's level of confidence in using certain types of visual aids?</li><li>▶ How can distractions be minimized?</li></ul>

## Types of visual aids

### The board

Chalk boards or whiteboards are the most widely used visual aid because they are inexpensive and available in most venues. The union can purchase portable boards to save hiring costs, as they are also useful for union meetings.

Electronic white boards are useful because information can be printed out from the board or recorded on a computer. They are cost-effective if there is a regular training room in the union office.

#### *They can be used to:*

- \* Build up a diagram
- \* Develop a discussion or debate
- \* Put up key words
- \* Record learners' responses from questions or exercises
- \* Summarize information or ideas

*What is written on a board is not permanent - it will be rubbed off*

*If the points are important, give learners a chance to write them down*

#### *Boards are flexible and useful for:*

- ➔ Recording responses or noting the progress of a debate
- ➔ Rubbing words out if they need to be changed or deleted
- ➔ Words, phrases or parts of a diagram can be highlighted or underlined, and different coloured chalks or marker pens can be used to emphasize points
- ➔ Developing and writing up summaries of key points, ideas and responses from the session

#### *Using a board*

- \* **Plan it into the session** by imagining the lay-out and what could be written on the board
- \* **Write clearly** with letters large enough to be seen from the back of the room
- \* **Use lower case letters** because they are easier to read than capitals
- \* **Write in straight lines**, unless creating a diagram - use focus dots on the far side to follow with your eye

*Remember practice makes perfect*

*Practice before you start the session or course*

- ✱ **Clean the board before and after use** so that the writing stands out well
- ✱ **Check** that there is enough chalk, or that the pens have not dried out

### Do not

- ➔ Use the board as a personal scribble pad
- ➔ Use colours that are difficult to see
- ➔ Talk to the board while writing (take the opportunity to pause and let people absorb what has been said).

Boards are a good replacement for flip charts because they are larger and can record more information. They are environmentally sound because they do not waste paper.

*Visual aids support what is being said - they are not a substitute for saying it*

If you are conducting a short exercise, the instructions can be written on the board instead of a flip chart, and rubbed off when finished.

## Flip charts and flip chart paper

Flip charts can be custom made and are usually available in all training venues. If not, the paper can be taped onto the wall or the back of a chair.

### *They can be:*

- ✱ **Used to build diagrams and record points**, ideas, responses or key words
- ✱ **Kept and stored for later use**, to write a report or make a hand-out
- ✱ **Used by groups outside the room** for planning and reporting back on tasks
- ✱ **Displayed on the walls** of the training room, they make the room look less impersonal, illustrating the progress and ideas of the learners
- ✱ **Used as check list** so that learners can see where they are in the session
- ✱ **Prepared before the session**, taped to a chart or wall and revealed one by one

*Flip charts are small, so check that they can be seen at the back of the room*

## Hand-outs

These are an important form of visual aid and are essential materials for learners to keep for future reference.

They are prepared in advance and reflect the learning objectives. They are written specifically for each session and take the learners needs and levels of experience into account.

*Decide when to hand them out*

*Will learners read the hand-out when you are talking?*

*Will they prevent people from having ideas?*

### *They can be:*

- ➔ **Handed out at the beginning** of the session to guide learners through the session
- ➔ **Given out at the end of the session** to reinforce information or to provide additional information
- ➔ **Used as instruction sheets**, case studies or questionnaires for exercises and tasks
- ➔ **Used to explain a diagram** or complex flow chart.

They need to be clearly written and well-spaced out on the page, with information recorded in a logical way.

**Sometimes it is useful to copy pages from a publication, but this should only be additional information, and not a substitute for a hand-out.**

## Power Point presentations

These require a computer, projector and screen or plain wall, and a power supply. They are prepared on the computer and can be copied as small slides on paper and handed out.

*Check the equipment before the session*

*Fixing a problem can take up valuable time during a session*

### *They are:*

- ➔ Prepared before the session
- ➔ Linked to the learning objectives and session outline
- ➔ Related to the information that is being presented
- ➔ Provide a summary or the key points of each part of a presentation

### *Do not:*

*Write sentences or copy text from a document onto a Power Point presentation. People read the text and do not listen to the speaker. If the text is small, it will be difficult to read.*

### *Designing a Power Point presentation:*

- ✱ Use a plain font that is easy to read from a distance
- ✱ Use large lower case letters, not capitals

- \* Use different colours to emphasise points
- \* When selecting pictures, graphics or diagrams make sure that they are large enough to be seen from a distance
- \* Do not add irrelevant or unrelated information
- \* Organize the information in a logical way that is well spaced on the screen
- \* Plan 'gimmicks' in a way that reveals information as needed, but does not distract from the information.

### ***Showing the Power Point:***

- ➔ Do not block or sit in front of the screen
- ➔ Check the focus before starting the session
- ➔ Try not to interrupt the flow by jumping between slides
- ➔ Face the learners, not the screen or computer
- ➔ Switch off when not using, as computer desk top information distracts.

## **Overhead projectors and transparencies**

These have now been replaced by Power Point presentations, but can still be useful when computers are not available.

They require:

- ➔ A projector, screen and power supply
- ➔ Special transparencies and pens to write up the information.

Blank sheets of paper can be used to reveal each point, or a pointer can be used to identify the point being referred to.

***The principles for writing and using them are the same as for Power Point presentations.***

### **Finally, for the educator:**

Unfamiliarity and clumsiness with equipment can be a major distraction.

Use body language to make a point. Stand up to close a session or an argument. Sit down to let people talk. Sit with the learners, or stand at the back to change the dynamic.

Moving around can vary the pace, but too much movement can be distracting.

*Visual aids can be  
distracting  
Use them carefully*



# HAND-OUT 5

## Activists as learners

### THIS HAND-OUT EXAMINES:

- ▶ The profile of a union activist
- ▶ Seven principles of learning

Individuals attend courses and workshops for different reasons and the educator can never presume to know the reason.

However, the educator can make some general assumptions from the information on the registration form or discussions with the union.

*I hear and I forget*  
*I see and I remember*  
*I do and I understand*

HAND-OUTS

### Union activists are generally adult learners who:

- ★ **Want to be able to change a situation** that is oppressive to one of fairness, equality and justice
- ★ **Are used to solving problems** at home and at work, and collectively in their own union
- ★ **Need to be actively involved** in their learning, and do not want to be lectured or told what to do
- ★ **Appreciate being treated with respect** and listened to
- ★ **Often feel threatened by authority** and need a sense of control
- ★ **Lead busy lives** and have to juggle work, activism and personal relationships.

### Principles of learning

These basic principles are a useful guide for planning and organizing sessions and materials.

***But remember that everyone is different - so these principles may not apply to everyone.***

The educator needs to observe people's reactions to information and exercises and note learners who appear to be having difficulties, so that they can be discussed with them during a break.

*Adult learners have different characteristics, backgrounds, experiences, motivations and learning styles from young learners*

***People learn better when an educator is 'learner centred'.***

In other words, the focus is on the learners during the planning, implementation and evaluation phases of a session and course.

An educator always needs to think of the target group, who they are and what their needs may be and, how to involve them in the process of learning.

**Overlearning**

*Moves information from the short-term to the long-term memory*

*Learning for perfect recall, like phone numbers, names*

*People need to be actively involved in the process and believe that it is important*

**The educator**

- ▶ *Asks a lot of probing questions about the topic*
- ▶ *Sets exercises that help people to recall the information in different scenarios*
- ▶ *Provides time to practice recalling the information*
- ▶ *Reviews the process*

***For example, during a course for union officers on labour legislation:***

- ★ *Present the information using a visual aid*
- ★ *Ask the officers to read and analyse the relevant parts*
- ★ *Give case studies to work on, or*
- ★ *Set up research exercises, or*
- ★ *Give the learners a task that asks them to write a report on the implications of the law for their union*

**Multiple sense learning**

*Sight and hearing are the most important senses for union education*

*75% of information is retained through sight, but only 15% through hearing*

*Learning improves when more than one sense is involved*

**The educator**

- ▶ *Uses visual aids to support the spoken word and makes sure people can see them clearly*
- ▶ *Includes models, charts, diagrams and pictures*
- ▶ *Gives opportunities for learners to hold and handle materials, where appropriate*

*Sight,  
hearing,  
touch,  
smell and  
taste*



***For example, in a workshop on designing a campaign:***

- \* Present a model in a Power Point presentation
- \* Hand out a diagram that demonstrates the model
- \* Include a DVD of a union campaign

## Active learning

*People learn best when actively involved in their learning*

*They learn by 'doing' if it is relevant and useful*

*Different levels of activity are needed for different types of learning*

**The educator**

- ▶ *Provides opportunities to use information and practice skills*
- ▶ *Asks probing questions to create debate and analysis*
- ▶ *Uses discussion groups, case studies and role plays*

***For example, in a course on negotiating skills:***

- \* Ask for existing experience and note the responses
- \* Provide information and a model
- \* Give a discussion exercise to analyse the model
- \* Conduct a role play followed by discussion and feedback

## Meaningful materials

*Learning is easier if people can relate it to a known frame of reference*

*Learning improves if the Information is useful to the immediate future of learners*

*People need to go from the 'known to the unknown'*

**The educator**

- ▶ *Begins with what people already know about the topic*
- ▶ *Uses examples and illustrations that are real and likely to be familiar to the group*
- ▶ *Presents information in a logical sequence*

***For example, in a workshop on economic policy:***

- \* Ask questions or use an exercise that allows people to share their understanding of economics in everyday life, relating wages to spending power
- \* Provide information on the current economic ideology, with statistics that relate to workers' lives
- \* Set an exercise that asks groups to identify the impact of the ideology on the workplace, family and the community
- \* Compare union policy with government/employer policies

## Transfer of learning

*People learn better if they can transfer what they learn back to their workplace*

*It is easier to engage people if they can see a use for what they are learning*

**The educator**

- ▶ *Uses examples and case studies of real situations that are familiar to the learners*
- ▶ *Asks people for examples from their own workplace or union when giving information*
- ▶ *Researches the sector, union or workplaces before planning the session*
- ▶ *Provides opportunities for follow up with the learners' union*

***For example, for a collective bargaining course:***

- \* Ask people to share experiences from their own workplaces
- \* Use real examples of collective agreements from the relevant sectors or union
- \* If people are from different sectors, set up small group work so that they work with people from similar situations

## Primacy and recency

*What is heard first and last is more likely to be remembered*

*Information heard in the middle is usually forgotten quickly*

*'Tell them what you are going to tell them and then tell them what you have told them'*

### The educator

- ▶ *Introduces sessions and summarizes at the end*
- ▶ *Breaks the middle into separate sections, each with an introduction and summary*
- ▶ *Pauses between different parts of the session to give people time to reflect for a few minutes on what has been said*

### **For example, in a course on labour law:**

- ★ *The educator breaks down the information into small sections with a short exercise between each section*
- ★ *Sets up small group tasks to analyse the information and share ideas in interesting report backs*
- ★ *During the summary, refers back to the main points of the information*

## Reinforcement and feedback

*When learning is recognized and rewarded, it is more likely to be retained*

*Negative criticism creates a barrier to learning*

*People need to know how they are progressing*

*Feedback should be given immediately after the exercise*

### The educator

- ▶ *Encourages people to ask questions*
- ▶ *Uses body language to show interest and acknowledgement*
- ▶ *Allows time to check and discuss progress*
- ▶ *Asks questions to check understanding*
- ▶ *Does not make exercises and tasks unreasonably difficult*
- ▶ *Uses questions to give constructive feedback*

### **For example, in a training course for new shop stewards:**

- ★ *Set up an exercise on interviewing a member*
- ★ *Give positive feedback first and ask questions to identify weaknesses*
- ★ *Leave time at the end to involve the shop stewards in commenting on the outcomes*





## HAND-OUT 6(A)

### Different kinds of learning

#### THIS HAND-OUT EXAMINES:

- ▶ Knowledge, Skills, Attitudes and Behavioural learning
- ▶ How to apply them in a session

*Before planning a session, educators need to know if they are focusing on knowledge, skills, attitude or behavior, or a combination of these*

HAND-OUTS

When we learn something new it usually changes:

- \* Our **knowledge** about something
- \* The level of **skill** to carry out a task or tasks
- \* An **attitude** about a particular issue
- \* How we **behave** in relation to a value or belief.

### Knowledge

People may listen to a speaker and be interested, but afterwards often find it difficult to explain the information to someone else.

In order to prevent this, the educator needs to ensure that learners have the opportunity to articulate new information during a session.

#### ***This can be done by:***

- \* Giving people the opportunity to make comparisons with existing information and experiences, explore new concepts through discussion, form their own definition and use the new information in speech or writing
- \* Presenting new information in a logical sequence, using active exercises so that learners are involved through questions and answers, discussion, reflection or research
- \* Providing opportunities to practice becoming familiar with the new information and beginning the process of storing it in long-term memory.

**Bringing about a change in people's knowledge involves:**

Presenting the information using visual aids



Using an exercise with questions and discussion to allow comparison with existing knowledge and experience



Building in tasks that provide time for reflection and an activity to use the information, such as research or a role play



Give feedback by questioning after the task.

**For example, in a session on changes to labour laws:**

- ✱ Ask people in buzz groups (small groups) to discuss what they find most difficult using the current legislation and to share their conclusions with the plenary
- ✱ Give a short presentation on the changes using visual aids
- ✱ Set up small groups to compare the old and new legislation and identify the impact on unions and workers
- ✱ Set up larger groups to work on a case study in which the new legislation has to be applied

## Skills

We can teach ourselves a skill or we can be taught, but competence only comes with practice. The longer we practice, the better we become and the less likely we are to forget how it is done.

- ➔ Skills can be divided into technical skills, interpersonal skills and organizational skills
- ➔ *Skills need to be relevant to the learners' positions and jobs in the union, so that they can continue to practice*
- ➔ Learners need knowledge and instructions in order to perform a task competently

*Remember  
-practice makes  
perfect, and takes  
time*

**A task can be divided into different types of skills.**

For example, riding a bicycle needs balance, observation and coordination skills, as well as knowledge of the traffic laws and an understanding of how a bicycle functions.

It is not always possible to provide a lot of time for practice and repetition in a session or course, so learners need to be able to practice when they go back to their workplace or union.

***Bringing about a change in people's skill levels involves:***

Providing verbal and written instructions that are clear and logical



Demonstrating the skill, using a DVD or resource person



Providing tasks to practice the skill and if possible time for repetition.

***For example, in a session on negotiating an individual grievance:***

- \* Use buzz groups or plenary questions to ask what types of grievances people have been involved in
- \* Give a presentation with visual aids on the stages of negotiation and ask for examples of each stage
- \* Show a DVD to demonstrate a negotiation and hold a discussion on the outcomes and tactics used
- \* Use a role play for learners to practice negotiating with management
- \* Follow the role play with feedback and discussion

**Attitudes**

Attitudes are personal and are formed over many years. They involve values, feelings, beliefs, likes and dislikes.

***Changing attitudes often means asking people to 'take a leap into the unknown'.***

Example: a boy grew up in a family where women carried the burden of domestic work and raising children, and where it was unacceptable for girls to have an education. Challenging this with an argument for women's rights and gender equality can be a difficult transition for an adult.

People often feel angry, upset and insecure when challenged about an attitude. They need a supportive environment to express anger and talk about the new ideas that are presented to them. After the anger, they need time to reflect and consider the impact on themselves and those around them.

This can be difficult for workers when management does not encourage the discussion of issues. A conflictual and oppressive environment makes it difficult for people to change their attitudes.

***Bringing about attitudinal change involves:***

Presenting new information or ideas objectively, using examples or stories



Implementing exercises and activities that provide people with the opportunity to express feelings safely and to absorb a new way of thinking



Providing time for reaction and reflection so that feelings can be examined calmly



Setting up activities that involve discussion and debate, such as role plays or research. This allows people to test new attitudes in a safe environment.

*Lasting attitudinal and behavioural change takes place after the course*

*Forcing change can be a negative experience for a learner*



***For example: in a session on sexual harassment,***

- ✱ Ask individuals to spend a few minutes thinking about an incident of sexual harassment that they have come across at the workplace
- ✱ Show a DVD highlighting different situations of sexual harassment and facilitate a discussion on what constitutes harassment
- ✱ Provide some information on union policy and principles regarding sexual harassment
- ✱ Set up small groups to discuss the different case studies and their impact on the people concerned
- ✱ Use multiple role plays to give learners the opportunity to practice listening to a member who has experienced harassment
- ✱ Set up small groups to discuss how to raise awareness of members on the issue

## Behaviour

Behaviour is complex because it is linked to knowledge, skills and attitude. It is about habits and traditions that have developed over many years.

People do not always find it easy to change the way they do things, especially as fears and insecurity can affect a person's behaviour.

The decision to change behaviour is best made by the individual after careful thought, and usually occurs after the course or session.

In a workplace or union situation, management can try to change behaviour by issuing instructions, orders or even ultimatums. However, in union education the aim is to persuade learners to change as a result of considered and careful decisions.

The best exercises to encourage people to learn new behaviour are those that help them come to a decision and then act upon it. These include structured discussions, research and writing, problem-solving experiences, reflection and role plays.

*People need to decide for themselves that there is a better way of doing things*

***Encouraging learners to adopt new behaviour involves:***

Providing new information and ideas that encourage a change in behaviour



Conducting exercises and activities that support a reason to change



Giving tasks that provide the opportunity to make reasoned decisions and put them into practice



Providing learners with time for feedback and reinforcement

***For example: in a session on speaking with members at the workplace***

- \* In the plenary, ask the learners to share how they communicate with members at the workplace
- \* Describe a communication model with visual aids and ask buzz groups of three to discuss what can go wrong with the model
- \* Conduct a listening exercise in small groups for learners to practice listening skills and ask the groups to share feedback on the exercise
- \* Hold a brainstorming and discussion in plenary to identify how to improve communication with members
- \* Ask individuals to prepare their own strategy to improve communication with members at the workplace, and distribute the strategies among the learners



## HAND-OUT 6(B)

### Learning objectives

#### THIS HAND-OUT DISCUSSES:

- ▶ The purpose of learning objectives
- ▶ Writing learning objectives
- ▶ Using learning objectives in participative methodology

Learning objectives are also called achievement-based objectives because they describe what people do with the learning in an observable way.

*Learning objectives hold the educator accountable to the union and the learners*

### The purpose of learning objectives

#### *Clearly written learning objectives help to:*

- ➔ Show the union and learners what the session is about
- ➔ Minimize unrealistic expectations among learners and reinforce motivation
- ➔ Help the educator select the content, exercises and tasks, and plan a logical session
- ➔ Implement effective evaluation procedures

*Union education is learner centred  
It starts with learners*

### Writing a learning objective

Writing learning objectives is an important skill for educators.

#### *Five essential questions need to be asked:*

##### **1. Who are the learners?**

It is not possible to know about every learner in detail, but the educator can work with a general profile of the target group. The course may, for example, be for union representatives or members. The title of the position gives some indication of who they are and their role in the union.

##### **2. Why do they need the course or workshop?**

The subject of the course may have been selected by the union leadership as a result of a problem faced by the union in a particular situation, or a current issue that needs introducing, or as part of a general training programme for union representatives.

### 3. When will it take place and for how long?

The length is usually dictated by the time for which learners are available from the workplace or the union office, but it is important for the educator to know this before formulating the objectives.

### 4. Where will it be held?

The size and accessibility of a venue makes a difference to what can be done in the time available. The educator needs to find out whether there is space for small group work, or for practicing a certain skill.

### 5. What is the learning for?

This question factors in the information from the previous four questions. The response describes what the learners are expected to achieve.

*Accountable education does not reduce two hours learning to one hour, or two weeks to one*

**'Learning' does not describe what the course will cover or what the educator will do**

But

**the changes in knowledge, skills, attitude or behaviour, or a combination of these that are expected as a result of the course**

*The type of change is identified in the learning objectives and describes:*

- ✱ The knowledge that the learners have gained
- ✱ The skills they have practiced
- ✱ The new or modified attitudes they have considered
- ✱ The changed behaviour they can adopt

*A learning objective starts with the words:*

**'By the end of the session learners will be able to - - - (and continues with an active word)**

For example: the learning objectives for a 90 minute session on conducting a union meeting for new shop stewards

**By the end of the session, the learners will be able to:**

- \* **Describe** a meeting procedure
- \* **List** the responsibilities of the meeting chair, secretary and note-taker
- \* **Plan** and prepare for a meeting

*For a longer session, the skills of drafting, moving and speaking to a motion could be added. The following session would include a meeting role play to practice these skills.*

*Another example: the learning objectives for a 90 minute session on recruiting migrant workers*

**By the end of the session, the learners will be able to:**

- \* **Explain** why it is important to acknowledge cultural issues when recruiting workers from other countries
- \* **Recognize and prevent** racial discrimination and harassment against migrant workers
- \* **Use** appropriate language and questions when talking with workers

*The following session could provide the skills to plan a recruitment campaign that takes into account cultural differences.*

**Objectives must be:**

- \* **Concrete** so that the learners can transfer the skills and knowledge to their working situation
- \* **Realistic and achievable** in terms of the general profile, the time frame and the problem
- \* **Related** to the role and work of the learners
- \* **Measurable** so that the impact of the session can be observed and evaluated.

## Checking relevance to the learners

If the learners cannot see the relevance and immediacy of the objectives, then the objectives will be meaningless and learning will be ineffective.

To avoid unrealistic expectations, the educator should make it clear that it is difficult to change the topic or issue, but that there can be fine tuning of or changes to the objectives.

The educator needs to check the relevance of the objectives at the beginning of the session or course.

**This can be done by asking questions such as:**

- ➔ What is not necessary or relevant?
- ➔ Which are the most important objectives?
- ➔ What is missing that could be included?

*Being prepared to listen and change respects learners as subjects not objects*

*It gives them ownership of their own learning*

### ***For example: in the session on conducting a union meeting***

The learners may have attended a previous course on the basics of meetings, but may have difficulties with the procedures on motions and debates. Or they may have problems with chairing a meeting.

The educator can change the second objective to **'Write** a motion and **justify** it during a meeting', and include it in the role play of a meeting.

Sometimes, even after a discussion, it becomes obvious that the objectives are not meeting the learners' needs.

Continuing would be a waste of time, so the educator needs to:

- ➔ **Stop**
- ➔ **Ask people what would be relevant to them**
- ➔ **Change the objectives**
- ➔ **Call a short break and modify the session plan**



## HAND-OUT 6(C)

### Active words for learning objectives

Learning objectives start with an active word or verb and need to describe the desired knowledge, skills, attitude and behaviour clearly and precisely.

Active words make it possible to measure whether the objective has been achieved.

*Start with. 'At the end of the session/course learners will be able to:*

Noun	Active Verb
<b>Knowledge</b>	Define, list, measure, recognize, specify, quantify, decide
<b>Comprehension</b>	Identify, illustrate, classify, systematize, give an example, check, contrast
<b>Application</b>	Construct, compete, refer to, motivate, inspire, sort, resolve, prove, verify, convince, avoid, unite, calculate, estimate, confront, select
<b>Analysis</b>	Analyse, compare, justify, simplify, distinguish between, criticize, argue a case, arbitrate, see the difference between
<b>Synthesis</b>	Combine, summarize, generalize, compose, merge, unify
<b>Evaluation</b>	Evaluate, support, criticize, measure, test, check, survey, verify, diagnose

It is difficult to measure outcome with words such as **'know'**, **'understand'**, **'enjoy'** or **'appreciate'** because they are subjective. It is only possible to measure it, if it can be demonstrated.

Learners may nod their head or smile, but that does not mean that they are understanding or enjoying the course!

*The following list of active verbs can help in finding the right word*

Abbreviate	Debate	Identify	Prepare
Administer	Decide	Illustrate	Present
Analyse	Deduce	Include	Prevent
Appraise	Defend	Increase	Promote
Arrange	Define	Indicate	Protect
Articulate	Describe	Inform	Provide
Assist	Design	Insert	
Ask	Detect	Integrate	Raise
Assemble	Determine		
Attend	Develop	Justify	Read
Audit	Diagnose		Reassure
Avoid	Differentiate	Lead	Rearrange
	Direct	List	Recruit
Build	Disaggregate	Locate	Reorganize
	Discuss		Rephrase
Calculate	Dissect	Maintain	Replace
Care for	Distinguish	Map	Request
Categorize	Divide	Match	Resolve
Change	Draw	Measure	Respond
Chart		Mobilize	Restate
Check	Edit	Modify	Record
Choose	Establish	Move	Reconstruct
Collaborate	Estimate		Relate
Collect	Evaluate	Name	
Communicate	Examine	Note	Safeguard
Compare	Exchange	Narrate	Select
Compile	Explain	Negotiate	Send Separate
Complete	Extract		Share
Compute	Extrapolate	Obtain	Simplify
Conclude		Operate	Solve
Conduct	Facilitate	Oppose	Sort
Connect	Find	Organize	Speak
Contrast	Follow	Outline	Specify
Contribute	Formulate		Strategize
Control		Paraphrase	Structure
Convert	Generate	Participate	Suggest
Cooperate	Guide	Perform	Supply
Create		Place	Support
Criticize	Hold	Plan	
		Position	Unite
		Practice	
		Predict	Verify
			Write





## HAND-OUT 7(A)

### Active learning exercises

This hand-out offers examples of active learning exercises that can be used in a session to assist people to share experiences and work collectively.

#### IT INCLUDES:

- ▶ Short exercises
- ▶ Small group work and tasks
- ▶ Ice-breakers and energizers

*Exercises must come from something and lead somewhere*

HAND-OUTS

The names of the following exercises are standard in most adult education or training situations. They can be adapted and used for any topic and target group, but are not useful for practicing skills.

#### Short exercises

This broad category of exercises can be used in many different situations. They include standard exercises, such as brainstorming and buzz groups, but with experience educators can create their own exercises.

#### *The purpose of short exercises is to:*

- \* Draw on people's experiences
- \* Demonstrate or illustrate a point
- \* Create a new experience
- \* Focus learners on a key point in the session

*Short exercises give people time to think about an issue before answering a question in plenary*

Short exercises focus on the immediacy or reinforcement principles of learning and can vary the pace of the session, and re-focus or create interest.

#### *Using exercises in a presentation*

- ➔ Short exercises can be integrated into a presentation of new information to provide people with the opportunity to compare it with their own experience and think about how it can be used.
- ➔ Link exercises with the learning objectives and select where to place them in the session, so that they are not a distraction.

Short exercises save time because they can be conducted while people remain seated. Several examples are provided below:

### Ranking or prioritizing key points in a session on leadership

Learners are presented with a list of leadership skills. They are asked, individually, to put them in order of priority for a union leader. The educator facilitates a discussion on each point, ending with agreed priorities.

### Using a picture or a cartoon for discussion in a session on gender equality

Learners are given a picture that represents some form of inequality and asked to note down their first impression. Questions from the educator can facilitate a discussion on the causes, impact or types of gender inequality.

### Definitions and interpretation in a session on union principles

Learners in buzz groups are asked to write down two words that describe collectivism. The educator asks people to share their words and facilitates a discussion to find a definition that is consistent with union principles.

Words usually have more than one definition. Asking learners to work out their own definition assists in understanding and using a word.

## Buzz groups

This is a form of rapid exercise that can be used at the beginning of a session, or as an introduction to a new issue during a session. Buzz groups:

- ✦ Give people time to focus on the topic, rather than having to reply immediately to questions in plenary
- ✦ Assist people to recall their own experiences and ideas
- ✦ Give the educator feedback on people's feelings or knowledge about the topic

In pairs or threes, learners work on a question for about ten minutes with those sitting next to them, so they are not required to move from their seats.

EXAMPLE

## For a session on organizing construction workers in the informal economy

The learning objective of the session is to develop an organizing strategy for women labourers in the construction industry

The exercise is used at the beginning of the session

### **The educator**

- ▶ **Organizes** the pairs so people are clear about who they are working with
- ▶ **Explains** the purpose and **writes** the question on the board
- ▶ ('What do you think are the main problems in organizing women labourers?')
- ▶ Asks learners to make a list to share in plenary (ten minutes)
- ▶ **Takes one point from each group and compiles** them into a list on the **board or flip chart**
- ▶ **Goes** round the groups until all **ideas are written up and allows time** for a short discussion
- ▶ **Refers to or uses the list** later in the session in small group work to develop a strategy

### **Or**

The buzz groups can be followed by a short Power Point presentation in which the educator gives some statistics on the number of women labourers in the sector, union membership, or a description of their lack of legal rights. After the presentation, small groups can develop a profile of women labourers for the strategy.

## Brainstorming

This is a simple and fun exercise that can energize people, generate interest in a topic or provide a space for people to think creatively about the issue.

### **The purpose is**

- ★ to generate as many ideas as possible on a question or problem.

*Remind people to keep responses short to make it easier to record them quickly*

***Ask learners to avoid criticizing or discussing any of the points raised, because it prevents people thinking creatively.***

Brainstorming can be done in plenary, or by dividing learners into two or three large groups.

Every learner's input must be recorded on a flip chart or cards, either by the educator or a group member.

The results of brainstorming exercises are used as discussion points, or to further develop ideas and options in small groups or the plenary.

## EXAMPLE

**For a session on dealing with membership problems**

The learning objectives are to identify and resolve members' problems at the workplace

- ▶ Explain that the purpose of the exercise is to make a list of all the problems that members and workers do or could experience at the workplace
- ▶ Ask people to call out a response, but not to criticize or discuss any point raised
- ▶ Record the responses on the board or separate cards, and call an end to the exercise when there are no more responses (do not let the exercise go on for too long)

**Then facilitate a discussion to categorize the problems, followed by a short presentation on solving workplace problems**

**Divide learners into small groups with a case study of a problem and ask them to discuss where and when the problem happens, what and who caused it and the different ways to resolve it.**

## Small group work

Small group work is used for more complex tasks or problems towards the end of a session or following a short exercise.

It is important to keep the group numbers at six or fewer, because with larger groups not everyone may have the opportunity to contribute. Make sure there is space for the groups to work without being interrupted.

The task is set out in a hand-out, with one or two questions and instructions.

*Too many questions in a task can be confusing and groups may not be able to finish on time*

EXAMPLE

## In a session for shop stewards on preparing to negotiate a collective agreement.

The sector is privatized and the management wants to reduce terms and conditions of employment and weaken the union.

The learning objectives are to develop a membership campaign that puts pressure on management.

The first part of the session used buzz groups and plenary discussion to describe the relationship with management and the main concerns of the members

### **The educator**

- ▶ Asks people to identify the different target groups within the union and list them on the board
- ▶ Hands out the written task sheet, divides the learners into small groups, ensuring equal gender representation in each group
- ▶ Explains that the purpose of the task is to find ways of involving all members in the campaign, and allocates each group two of the major concerns identified by the first buzz groups.

### **The task**

‘Discuss the profile of the target group and develop a campaign plan of action for them. Write the plan on a flip chart and select a spokesperson.’

🕒 (Time: 40 minutes)

***Following the reporting back ask for questions and feedback, and after the discussion facilitate the development of an overall campaign strategy.***

## Snowballs

This is a process that progressively combines different types of exercises on a single topic. The questions are different for each part of the exercise and have a logical sequence.

**For example, in a 90 minute session for elected shop stewards with more than two months experience:**

*Always make sure there is enough time for the groups to complete the task and report back*

*The purpose of the exercise is to develop strategies for dealing with workplace problems*

Stage	Process	Task
<b>One</b> (5 min.)	<i>Question to individuals</i>	<i>Think of something you have tried to resolve as a shop steward.</i>
<b>Two</b> (25 min.)	Divide learners into pairs (buzz groups)	Share and discuss how you dealt with the problem and make a list of the major difficulties shop stewards experience handling the workplace problems of members.  Ask each pair for a short report back and list the difficulties on the board.
<b>Three</b> (30 min.)	<i>Divide learners into two groups, splitting up each pair</i>	<i>Ask the groups to</i> <ul style="list-style-type: none"> <li>▶ <i>Select two items from the lists compiled by the buzz groups</i></li> <li>▶ <i>Discuss some solutions for dealing with the problem.</i></li> <li>▶ <i>Record the answers on a flip chart</i></li> </ul>
<b>Four</b> (30 min.)	Place flip charts at the front of the training room and ask people to return to the plenary	Facilitate a discussion to compare the different ways of dealing with problems and ask probing questions to explore the outcomes.

Then

- **Summarize the different ways of dealing with problems, link them to a model for handling problems and distribute the hand-out.**
- **Later in the course set another exercise with case studies so that learners can use the model.**

## Ice-breakers and energizers

These are short exercises or activities that should always be linked to trade union issues or the objectives of a session or course.

### Ice-breakers

These are conducted at the beginning of a course, or a session if there is a different educator or facilitator.

This type of activity assists people, including the educator, to get to know each other at the beginning of a session or course.

*If people are looking embarrassed or uncomfortable, stop and ask the problem or change the activity*

They give the educator an indication about the learners' level of experience, provide an introduction to the content of the session and start the process of group development.

***But***

If ice-breakers ask people to reveal personal information or are not relevant to the course, they can be embarrassing and threatening.

- ➔ To avoid this, match the exercise to the profile of the learners and link it to the trade union movement.

**Energizers**

These activities involve learners in an activity that moves them from their seats. They are used when people are feeling tired or bored or there is tension in the training room.

***They can:***

- ➔ Wake people up
- ➔ Provide a change of pace
- ➔ Assist concentration
- ➔ Raise energy levels
- ➔ Help group development
- ➔ Be used at any time during a session or course

*Energizers should be quick and fun, not difficult or threatening*

They are particularly effective after lunch or a long and difficult task, or at the beginning of the day.

***There are many examples of these types of exercises on the Internet. Involve people by asking if they have a favourite to share.***







## HAND-OUT 7(B)

# Selecting and conducting active learning exercises

This hand-out describes some basic principles and guidelines for selecting and using exercises in a session.

### IT COVERS:

- ▶ Selecting exercises
- ▶ Setting up groups
- ▶ Reporting back
- ▶ Facilitation.

A traditional academic lecture does not take into account different backgrounds, levels of knowledge, types of experience or learning speeds.

The presentation of information is an integral part of a session, but should be short, include visual aids and short exercises, and be followed by questions and discussion, or small group work.

*The use of participatory methods reinforces trade union and learner-centred principles:*

Method	Reason
<b>Participatory methods:</b>	
Involve more people and prevent plenary domination in discussions	<i>It is easier to contribute ideas in small groups</i>
Build trust within the group	<i>Participatory methods ncrease responsibility and tolerance</i>
Create and maintain interest and enthusiasm	<i>Exercises allow time for analysis and self-expression</i>
Assist people to test out their answers and ideas on others	<i>Practising in a safe environment builds confidence to speak in plenary</i>
Demonstrate a collective approach to learning and to union work	<i>People learn to work together</i>
Allow learners to interpret information and compare it with new or previous knowledge	<i>Participatory methods draw on experience and prior knowledge and encourage analysis and ownership</i>
Provide insight into other people's attitudes and perceptions	<i>People can accept that others may have different opinions</i>

## Selecting an exercise

Problems can occur during group work or in plenary discussion after the exercise.

### People may feel that

- ✱ They are not being treated seriously
- ✱ Confused because they do not understand the purpose
- ✱ Rushed and defensive

This can lead to interruptions and judgemental remarks, or prevent people from contributing.

*The educator needs to be aware of these situations when selecting an exercise.*

### Ask the following questions

- ✱ What are you trying to achieve?
- ✱ What are the learning objectives of the session?
- ✱ What are the language and literacy levels, gender, culture and work sector of the learners?
- ✱ How much time can be allocated?
- ✱ How many learners are there in the session?
- ✱ Is there enough space available in the venue?
- ✱ Which part of the session or course will the exercise be in?

*Exercises take longer in the training room than on paper*

### Avoiding problems

- ➔ Place longer more challenging exercises towards the end of a course or session, when people are more comfortable working together
- ➔ When there are different languages or lower literacy levels, do not make the exercises or tasks complicated
- ➔ If an exercise needs intensive work in small groups, ensure that there is enough space for the groups so that they can concentrate
- ➔ The more learners, the more time is needed. Even if the exercise is modified, larger groups are more difficult to manage

If possible, test out the questions on colleagues. Ask them if they make sense and how they would feel answering the questions.

**Always ask yourself;**

- \* Are there enough options to respond to?
- \* Is it clear or too complex for the time frame?
- \* Will it offend a group or an individual and prevent people from responding?

*If you cannot find answers to your question, nor can the learners*

*There are many examples available of exercises that can give the educator ideas, but they always need adapting to the topic, learning objectives and target group.*

## Setting up groups

There are many different ways of dividing people into groups.

**For example:**

- \* **Giving people numbers:** *this is useful and quick, but may result in a gender imbalance*
- \* **Allocating the names prior to the session and writing them on a flip chart:** *this is good for longer exercises, to ensure a gender balance and mix of experiences*
- \* **Asking people to make up their own groups, giving some criteria for them to follow:** *this is best used towards the end of a course, when people feel comfortable and know each other*

**Points to note**

- \* Always factor in the time that it takes to move people into groups
- \* Make sure the groups are different for each exercise so that people get a chance to work with everyone
- \* Take into account gender balance, language barriers and levels of experience
- \* Ensure that people do not feel threatened or uncomfortable. Monitor the groups and move people if necessary

## Reporting back

Always allocate sufficient time for reporting back. Learners feel frustrated and resentful if they are rushed or cut off while sharing their contributions, and will question the point of doing the exercise.

Reporting back can be repetitive if the question or task leads people to similar conclusions. This can be avoided by giving each group a different task or question linked to the same issue or problem.

*Vary the reporting back.*

*Long reports are boring*

*Get people out of their seats, where possible*

### Different types of reporting back:

<p><b>Responses to questions in plenary</b></p> <p><i>Facilitated by the educator who:</i></p>	<ul style="list-style-type: none"> <li>☒ Use for buzz groups, brainstorming, overhead questions</li> <li>☒ Useful when responses will be similar</li> <li>☒ Give everyone a chance to participate</li> </ul> <ul style="list-style-type: none"> <li>⇒ Explains the question and gives instructions and a time frame</li> <li>⇒ Ensures that everyone contributes</li> <li>⇒ Writes up exactly what is said</li> <li>⇒ Seeks clarification if necessary, or asks learners to summarize in one or two words</li> <li>⇒ Makes sure that all responses are recorded and checks if anyone has anything to add</li> <li>⇒ Uses the information in the next part of the session</li> </ul>
<p><b>Responses on coloured cards</b></p> <p><i>Facilitated by the educator who:</i></p>	<ul style="list-style-type: none"> <li>☒ Use for brainstorming, individual responses or buzz groups, or for sensitive issues</li> <li>☒ Useful for structuring responses into categories or identifying priorities</li> <li>☒ Can prevent embarrassment if the issue is sensitive</li> </ul> <ul style="list-style-type: none"> <li>⇒ Writes up the question and gives instructions</li> <li>⇒ Organizes cards and marker pens, so that there is sufficient for everyone</li> <li>⇒ Asks groups or individuals to write responses in one or two words, one response per card, and</li> <li>⇒ Instructs where and how to place the cards (walls or flip chart)</li> <li>⇒ Facilitates a discussion on the categories or ranking of the cards, and joins duplicate responses</li> <li>⇒ Uses the results in other parts of the session, or continues with small group work</li> </ul>

<p><b>Group reporting back</b></p> <p><i>Facilitated by the educator who:</i></p>	<ul style="list-style-type: none"> <li>☒ Use for small or large group work</li> <li>☒ Useful for problem solving and sharing solutions and ideas</li> <li>☒ Can build confidence in speaking to groups</li> </ul> <ul style="list-style-type: none"> <li>⇒ <i>Explains the purpose and task, and gives written and spoken instructions and a time frame</i></li> <li>⇒ <i>Asks each group to select a spokesperson and to summarize responses on a flip chart</i></li> <li>⇒ <i>Monitors time so that specific groups do not dominate</i></li> <li>⇒ <i>Facilitates questions and feedback between groups, and provides time for comparisons and outcomes to be discussed</i></li> </ul>
<p><b>Gallery reports</b></p> <p><i>Facilitated by the educator who:</i></p>	<ul style="list-style-type: none"> <li>☒ Use for reporting back on small group work</li> <li>☒ Useful if the reports are likely to be repetitive or long</li> <li>☒ Gives people the opportunity to move around and discuss responses with different people</li> </ul> <ul style="list-style-type: none"> <li>⇒ <i>Asks groups to record their answers on flip charts (but limits the number of pages) and displays them on the wall</i></li> <li>⇒ <i>Instructs people to walk around and read the responses of the other groups and seek clarification from others</i></li> <li>⇒ <i>Asks them to look for certain factors, for example, comparisons, similarities or differences, and to make a note of points they would like to raise</i></li> <li>⇒ <i>Facilitates a discussion on the outcomes, noting the key points</i></li> </ul>

**Visual representations**

*Facilitated by the educator who:*

- ☒ Use for small group work and longer exercises
  - ☒ Useful for developing campaigning tools, or to emphasize an important or sensitive issue
  - ☒ Can provide space for creativity and develop collectivism
  - ☒ Pictures, songs, poetry, mime or role plays can be used
- 
- ⇒ Gives clear written and spoken instructions
  - ⇒ Asks the groups to choose how they want to make the presentation or ask all groups to use the same type
  - ⇒ Allocates sufficient time for preparation and presentations
  - ⇒ Writes up points to note for giving feedback and asking questions after the presentations
  - ⇒ Provides sufficient materials and equipment to support the groups
  - ⇒ Monitors the preparation carefully and gives support where needed
  - ⇒ Facilitates feedback and discussion between the groups after the presentations
  - ⇒ Records the presentations, with permission from the groups, for later discussion

**Minimize problems by:**

- ★ **Stopping individuals from dominating** when reporting back by setting criteria for selecting people to give reports
- ★ **Using probing questions** to advance the discussion
- ★ **Giving strict time frames** for group reports so that they are fair for each group
- ★ **Ensuring that people can hear and see** the person who is reporting back
- ★ **Avoiding cutting people off** while they are talking
- ★ **Showing respect by not writing on a group's flip chart** without permission, as it belongs to the group
- ★ **Summarizing the reporting back** at the end of the session by linking it to the learning objectives and the next session

*People need to feel positive and motivated after exercises and tasks*

- \* **Not repeating what the learners have said**, but trying to find common themes or links, mentioning comparisons and differences, and asking questions if there is a need for clarity or more information.

## Skills to facilitate group work

An educator tries to give people ownership of their own learning. Every educator has their own style, but at the same time needs to follow the basic principles.

Providing ownership and working with participatory democratic methods mean that the unpredictable often happens.

Part of the challenge is not to fear such occurrences, but to use them constructively, avoiding taking control of the situation. When an educator dominates, any sense of ownership is taken away from the learners.

*Group work is not an exam*

*There are no right or wrong responses, just lots of ideas and possibilities*

### Some guiding principles:

- \* An educator is not an 'expert' or the source of all knowledge - **when asked a question, open it up to the plenary so that people can learn from each other**
- \* Trade union activists have strongly held beliefs and points of view - **acknowledge them and encourage debate, even if they are outside union principles or you do not agree with them**
- \* A judgmental remark made to individuals in front of the group creates a negative environment and people stop participating - **if a person's behaviour is a problem, speak to that person in private**
- \* Demonstrate good listening skills - **set an example by recognizing and acknowledging all contributions and writing up responses accurately on the board or flip chart**
- \* Anticipate situations that may cause tensions - **be flexible in dealing with problems and facilitate solutions with the learners**
- \* Encourage ownership so that people feel they are being treated as adults - **include learners in workshop decision-making, for example, how groups are set up or if they need more time**
- \* Monitor small group work regularly - **but only intervene if there is a misunderstanding**

*Never assume you have understood what a person says*

- ★ Your understanding may be different to others - ***summarize the situation regularly and invite others to contribute***
- ★ Feedback is an important part of learning, but avoid being patronising - ***ask questions instead of making statements about someone's response or input***
- ★ Encourage those who find it difficult to participate, but not in a way that makes people feel uncomfortable - ***set an example of tolerance and respect for difference.***

***And finally, make sure it is a good and enjoyable experience for everyone.***



# HAND-OUT 7(C) Asking questions

This hand-out examines the importance of asking questions in support of learning.

## IT COVERS:

- ▶ Why ask questions
- ▶ Types of questions
- ▶ Asking questions
- ▶ Responding to questions

*When in doubt  
ask don't tell*

## Why ask questions

*Asking questions helps union activists to learn because it:*

- \* Allows them to use the skills, knowledge and experience that they bring with them to the session or course
- \* Establishes a process of enquiry and dialogue
- \* Recognizes that learners have ideas and knowledge to offer
- \* Ensures interaction and debate between learners and with the educator

Asking and responding to questions is a valuable skill, not only in the learning context, but also when communicating with members, workers, and even management.

*An educator asks questions for different reasons:*

- \* **To create and maintain interest** by allowing learners to explore the topic
- \* **To assess understanding** or check that there is no misunderstanding
- \* **To obtain feedback** to find out what people think of something, or if they are having difficulties
- \* **To share experiences** and contribute ideas and knowledge
- \* **To promote thinking** to look deeper into a topic or issues
- \* **To facilitate retention** and give people an opportunity to talk about new information
- \* **To introduce a new topic** so that people can focus on the issue.

## Types of questions

There are different types of questions and it is important to select the right type of question for a particular situation.

### Open or closed questions

Open questions	Closed questions
Have more than one answer and promote thinking	Have one answer, either no or yes and prevent thinking.
<b><i>They begin with</i></b> 'How did you do that?' 'What did you like about it?'	<b><i>They begin with</i></b> 'Did you go to the - - - ?' 'Did you like it - - - ?'
The person responding is then encouraged to explain something in more detail.	There is no incentive for the person to elaborate further.

Closed questions can be followed up with a probing question, but the person may be less likely to give an open answer.

### Information questions

These are asked to establish a fact without analysis, interpretation or opinion. Usually there is only a right or wrong answer.

What time did the demonstration begin?

*or*

How many people went to the demonstration?

### Leading questions

These seek a specific answer and provide a clue to the answer. They influence the response and can appear manipulative. They prevent people thinking for themselves.

Did you think that the demonstration was a waste of time?

*instead of*

What did you think of the demonstration?

## Rhetorical questions

These require no response. They make a point and are often used to encourage a person to consider a message, make a statement or pass judgement.

Couldn't you even get to the demonstration on time?  
What's the point of going to a useless demonstration?

*Rhetorical questions should not be used in the learning context, as they can be insulting and the learner will feel suspicious of other questions asked by the educator.*

## Probing questions

These are the most important questions to ask in the learning context, as they set an environment that encourages discussion.

*If people have difficulty responding, try breaking the question down into smaller parts*

Why do you think so many people came to the demonstration?  
How would you change the organization and strategy?

## Asking and responding

Questions can be asked in different ways, which have an impact on how learners respond or feel able to respond.

*Responding to your own question stops people from answering*

## The overhead question

This type of question is asked to plenary and invites everybody to think of a response.

It gives people who feel comfortable responding the opportunity to share their views.

### **The educator:**

- \* Asks the question and then waits for a response, because people need time to think about how to respond

**Do not answer the question. If no one answers, rephrase the question.**

## The direct question

This can help a person who finds it difficult to be heard or prevent others from dominating.

### *The educator*

- \* Asks the person if they would like to respond and pauses to give them time to concentrate, before asking the question

*If the person has trouble responding or indicates they do not want to answer, ask if anyone else would like to respond.*

*Listen actively to all responses*

*Do not repeat someone's answer. Ask the person to explain their response*

## The combined question

This begins as an overhead question and is used to gain attention before asking a direct question.

### *The educator*

- \* Asks the question, pauses, then names a person to respond

*Both direct and combined questions can embarrass people. Select a person who can respond and is not silent by choice.*

*Never ignore a response*

*Always acknowledge a response*

*Say 'thank you that was interesting'*

## The relay question

This makes use of combined knowledge and experience in plenary, prevents the trainer from looking like the expert and creates a more equal environment.

### *If a learner asks a question*

- \* The educator relays the question back to plenary, or to an individual, and waits for a response

## HAND-OUT 8 Planning a session

### THIS HAND-OUT DISCUSSES:

- ▶ A process for planning a session
- ▶ Some principles to follow
- ▶ Stages to support learning

*Plan a session based on the learning objectives, and be prepared to amend the objectives if necessary*

### *Planning and writing a session plan is useful:*

- \* As a guide during the session
- \* To ensure the learning objectives are met
- \* As a tool for evaluation
- \* For other educators who may conduct the session
- \* As a reference for planning other sessions on a similar topic

### A process for planning a session

Draft learning objectives for a session are drawn up as part of designing and planning a course. They can be amended and refined during each step of the process.

### Step 1: The target group

#### *When planning a session, it is also useful to know:*

- The tasks that the target group are expected to perform in their union role
- The sector and type of workplace they come from
- The gender and age profile of the group
- The current level of knowledge, skills and experience

This information can be gathered from the union office and questions included on the course registration forms.

An example of a target group: newly recruited young workers from the IT sector who are on short-term contracts have volunteered to work on a campaign for better conditions in the sector. They are university graduates and are mainly women.



## Step 2: The topic

As topics can be broad, the educator needs to make a decision about what to include in the session and what to leave out. It is a difficult decision, but the aim is to ensure that the selected content is specific to the objectives and suitable for the time frame, so that space is left for practice and discussion.

### Ask the following questions

#### What **must** the members of the target group know?

- The essential skills, knowledge and behaviour essential to carry out their role in the union.

#### What additional skills **should** they have?

- Additional skills and knowledge that assist them to perform tasks and responsibilities.

#### What would it also be nice for them to know?

- Skills and knowledge useful, but not essential for the job.

*Never try to put too much into a session*

*It is better to learn a little well, than a lot superficially*

A content selection worksheet helps to organize the content related to the topic.

EXAMPLE

### A 90 minute session on recruitment in a one-day workshop for new members in the clothing sector

#### Learning objectives: learners will be able to:

- ▶ Explain how the union benefits workers
- ▶ Sign up new members

Knowledge			Skills		
Must know	Should know	Nice to know	Must have	Should have	Nice to have
Union benefits	Union policies	Union history	One-to-one communication skills	Public speaking skills	Negotiating skills
Process for signing up new members	Structure of the sector National trade union laws	ILO Conventions	Interviewing skills	Organization skills	

 **Step 3: The learning objectives**

The learning objectives can now be adjusted to factor in the information gathered in Steps 1 and 2.

 **Step 4: The structure**

A session is a self-contained unit of learning within a course and needs to have its own logic. As part of a course, it needs to have links to the previous and following sessions.

Learners need to experience a sense of progress as they move through the session. The structure and design of the session should not feel confusing to the learners.

*Remember the principles of learning and the time needed for knowledge and skills to be taken into long-term memory*

It needs to have:

**A beginning -**

Including the introduction to the session, checking the learning objectives, outlining expectations and explaining exercises and tasks.

**A middle -**

Which is the body of the session and needs to have a logical order that demonstrates progress.

**An end -**

Which is used to summarize experience and ideas and review learning outcomes.

## EXAMPLE

## A 90 minute session on recruitment in a one-day workshop for new members in the clothing sector

Beginning (10 min)	<ul style="list-style-type: none"> <li>▶ Review of previous session</li> <li>▶ Explanation of the learning objectives and asking if there are any questions for clarification</li> </ul>
Middle (65 min)	<ul style="list-style-type: none"> <li>▶ Short exercise to find out why people joined the union</li> <li>▶ Discussion of what prevents workers from joining the union</li> <li>▶ Short presentation on union recruitment policy and procedures</li> <li>▶ Plenary discussion on how to approach new workers and a visual aid on communication skills</li> <li>▶ Multiple role play to practice interviewing and recruiting a worker, followed up by feedback and review</li> </ul>
End (15 min)	<ul style="list-style-type: none"> <li>▶ Summary of the session and short discussion on how to develop an individual recruitment plan</li> </ul>

**Step 5: Selecting methods and techniques**

The methods, tasks and exercises need to be appropriate for the type of learning and time frame of the session.

- **Start with short exercises at the beginning** that assist to focus and draw on experience
- **Use small group work or role plays towards the end** of the course or session, or following a presentation of information
- **Problem-solving needs longer exercises**, such as small group tasks, but not brainstorming or buzz groups
- **Leave time to give instructions**, verbally or in writing, before a task or exercise.

*Remember - everything takes longer than anticipated*



EXAMPLE

**For the example of the 90 minute session on recruitment in a one-day workshop for new members in the clothing sector**

Buzz group	Ask people in threes to discuss why they joined the union. Share the responses in plenary and write them on the board (10 minutes)
Brainstorming	Ask people the reasons why workers do not join the union. List the responses on the board to be used in the multiple role play (10 minutes)
Presentation	Information on union recruitment policy and procedures. Begin by asking people how they were recruited and finish with a discussion of the best way to communicate with workers about the union (20 minutes)
Multiple role play	Divide people into small groups of three and ask them to take turns to be a non-member, a recruiter and an observer. The non-members pick reasons for not joining the union from the list on the board, the recruiter practices the skills discussed in the presentation and the observer takes notes. Follow with debriefing and feedback (25 minutes)
Summary	Plenary discussion on how people will plan to recruit when returning to the workplace, with notes taken by the educator (15 minutes)



**Step 6: Selection of materials**

Make a list of the equipment and materials needed for the presentation, tasks and exercises. If you plan to show a DVD, make sure there is a computer, screen and power points.

Decide on the number and type of written hand-outs and task sheets that are needed to support learners.

*Hand-outs are a useful guide for transferring learning to the workplace or union office*

***Hand-outs must be relevant to the session, easy to read, accurate and well set out.***

- They need to be suitable for the language, knowledge and literacy levels of the learners; and
- Must not contain sexist or stereotyped language.

## EXAMPLE

**For the example of the 90 minute session on recruitment in a one-day workshop for new members in the clothing sector****Materials could include:**

- ▶ Hand-outs on the union recruitment procedures, one-to-one communication skills and recruitment forms
- ▶ A task sheet for the multiple role play
- ▶ A short DVD on recruitment in place of a presentation
- ▶ A board, flip chart and paper and board markers

**Step 7: Timing**

The timing of a session is not easy to judge the first time it is conducted:

- Always include time for moving people into groups and for reporting back and feedback
- Learners will not feel a sense of progress if they are rushed
- Build in flexibility in case some parts take longer than anticipated. It may be necessary to leave something out if learners are experiencing difficulty with one part of the session.

**Step 8: Session plans**

There is no right or wrong way to draw up a session plan. While there are many examples, the educator needs to feel comfortable with the selected plan:

- Make the plan **clear and easy to read**: use margins, tables and spacing
- Allow **room to write in comments** during the session
- Indicate when the **exercises and tasks will take place** and **how long** they should take
- **Include questions** for the exercises and tasks
- **Ask other educators** for their comments: a session plan should be accessible for other educators who may run the session
- **Explain the key points** and information that need to be given during the session.

*The first time a session is conducted is a pilot. After the session, analyse what did and did not work and be prepared to make changes for the next time.*

## Principles and points to consider

Every new fact, idea or concept is best taken in by the learners if they can relate it to information that is already known

### Go from:

<b>The known or local</b>	»»	to <b>the unknown or distant</b>
<b>The present</b>	»»	<b>to the past</b>
<b>The concrete</b>	»»	<b>to the abstract</b>

Begin by exploring the experience and existing knowledge of the learners.

For example, in a session on meeting procedures, ask the learners to recall what type of meetings they have attended or participated in. Most people have been to some kind of a meeting in their lives.

Start with the situation today, rather than the situation 100 years ago. Learners were not there 100 years ago and find it difficult to relate historical facts to the current situation. They need to be able to compare the current situation with the past.

For example, ask learners to describe the union movement today. Then describe what it was like 100 years ago and set up an exercise to find similarities and differences.

Link practical experience to conceptual or abstract theories. It is difficult to understand theory without something concrete to link it to. Starting with theory means that people can lose concentration. Begin with something that they can relate to.

For example, in an introductory session on negotiating skills, the educator can conduct a short spontaneous role play on bargaining in a market. This creates the concrete experience before introducing the union theory and principles of union negotiating.

## Finally, remember

Adults are different. They take in information and learn in different ways. They learn at different speeds and have different attention spans

### *The educator needs to:*

- Vary the pace
- Use a variety of visual aids during the session
- Use short exercises during the presentation of information
- Allow time for people to complete exercises and tasks and ask questions

## Stages in support of the learning process

**Gain learners' attention and interest**

*(Make them feel pleased to be there)*



**Inform learners of expected outcomes and objectives**

*(People like to know where they are going)*



**Assist in recalling past knowledge and experience**

*(Participants have a wealth of experience – work with it)*



**Present new information**

*(Now the learners will be interested and ready to listen)*



**Allow questions and discussion in plenary or use short exercises**

*(Part of the process of testing ideas and integrating information)*



**Build in practice and exercises**

*(This takes learning to a higher level and helps people to articulate new information, practice a skill or test out new attitudes)*



**Provide time for reinforcement and encouragement**

*(People learn best when they can feel progress. They need to know they are doing alright)*



**Conclude with a summary of their experiences, ideas and learning outcomes**

*(This completes the session and avoids learners leaving with questions in their minds)*





## HAND-OUT 9

# Using film and guest speakers

### THIS HAND-OUT COVERS:

- ▶ Introducing film
- ▶ Different types of film
- ▶ Selecting and using a film
- ▶ Using a guest speaker effectively

*Short films are very useful and can be used in many different situations*

*The educator can take one from a longer film*

HAND-OUTS

Using other guest speakers or film makes a change from the course or session educator.

### Introducing film

The term film is used to describe a visual medium that tells a story with a series of moving pictures and sound. It can be a powerful method for educating, a propaganda tool, as well as a source of entertainment, and is a universal medium for communication.

***Today film is readily available on videos, DVDs, television or the Internet.***

For the purposes of trade union education, film can be divided into four useful categories:

- \* Triggers
- \* Documentaries
- \* Instructional
- \* Inspirational

*There are disadvantages*

*Film can prevent participation, dominate, distract, mislead or make people bored and tired*

Watching a film can reproduce events, depict a situation and span distances and time. It can illustrate the causes of a problem and help to find solutions.

#### A film can:

- ➔ Let us look into a situation and make us think, laugh or cry
- ➔ Provide information and vary educational techniques
- ➔ Reinforce our beliefs as we see what other trade unions and activists are doing as part of the struggle for rights
- ➔ Challenge learners to debate issues and compare situations
- ➔ Illustrate a situation, making it more real as learners use sight, hearing and emotions

*Film is a one-way form of communication, so the educator must plan activities into a session to ensure that it is a two-way communication experience.*

## Different types of film

### Trigger films

These are short, no longer than ten minutes. They show only one event and the story is usually incomplete. They can be described as looking at 'a slice of time'.

The fact that they are incomplete and short gives the educator a range of exercise choices. For example, if the trigger shows one part of a union meeting or negotiation, there are number of questions and problem-solving scenarios that the learners can be asked to do in plenary or groups.

#### ***Trigger films can provide a basis for:***

- ✦ Analysing the running of the meeting or the tactics of a negotiation
- ✦ Debating how to solve the problem that is presented in the trigger
- ✦ Re-enacting the situation in a role play
- ✦ Debating the issue and comparing how it is done in the learners' unions, or making check lists

### Documentaries

Documentaries give a complete picture of a situation that is true to life.

They are:

- ➔ Well-structured and present a set of facts with opinions
- ➔ Can be used instead of a guest speaker
- ➔ Are useful for providing information on a specific issue, such as the environment or the economy

They are longer than a trigger film, so need more time in the session, taking into account the exercise.



***Exercises can be designed to:***

Encourage learners to spend a few minutes reflecting on the documentary and identify a question that they want answered



Share the questions and invite people to attempt to answer other people's questions



Facilitate a discussion with a view to listing questions that would require further research



Divide learners into groups, giving each group a question to research and bring the findings back to the plenary.

***This final part of the exercise can be given as an after session task, with time being provided later in the course to share the findings.***

*or*

***Ask learners to:***

Reflect on the film for a few minutes and make notes of key points



Explore the impact on trade union work and policies in groups and share these in plenary



In plenary, compile a list of points that could be included in union policy documents.

For example, in a session on trade unions and the environment, the documentary could be followed by an exercise to analyse the environmental impact in a specific sector and identify the potential issues for workers.

**Inspirational**

Trade union movements around the world have made many inspirational films depicting bravery in the face of impossibly difficult situations.

A number of feature films have also been made about union or community struggles, or about individuals, such as Mahatma Ghandi and Nelson Mandela, who have acted with extraordinary courage and integrity.

This type of film can strengthen resolve to either enter into or continue with action. They can be used to argue a point or develop ideas about how to meet a challenge.

Feature films can be shown in the evening during a residential course. If shown early in the course, they can create the feeling between learners of being part of a shared struggle. They can be concluded with an informal discussion by asking people what inspired them or how they relate to their own situations.

In non-residential courses, shorter films or excerpts of feature films can be used. There are many inspirational films about strikes or protests that can be used in campaign planning.

***For example, in a session on planning for a strike:***

Through questions and group work, learners can be asked to:

- ✱ Analyse the way the strike was planned and executed
- ✱ Discuss whether the same tactics would work in their situation
- ✱ Suggest alternative tactics that could have been used
- ✱ Develop a check list of do's and don'ts when planning a strike

## **Instructional**

Instructional films are useful for teaching skills. They are structured in stages or steps, using graphics and diagrams for learners to follow.

For example, they can be useful in courses that teach basic computer skills to representatives or on union finances.

Both of these areas need specific skills, which are important for the management of the union.

They can be shown before a practical task so that learners can visualize how something is done.

After the practice, the film can be used as a guide for feedback and learners can analyse performance in relation to the film and identify strengths and weaknesses.

## Selecting and using film

No film is exactly right for the intended purpose, so it is important to select films creatively. The Internet is a useful research tool, and You Tube offers a range of materials that can be accessed and used easily in the training room.

*It is important to view a film before using it to establish the:*

- \* Title
- \* Country of origin and author
- \* Length
- \* Condition
- \* Date
- \* Suitability for the target group
- \* Language, accents and culture
- \* Relevance to the topic

*Is it suitable for the target group?*

*Is it relevant to the topic?*

*Can it create discussion or an exercise?*

Some interesting films were made in the United Kingdom in the 1970s during the years of serious industrial unrest. They depict the struggles of the miners and other blue-collar workers and are inspirational and interesting, but the accents may be broad and are difficult for people whose first language is not English.

*Before showing the film*

- \* Introduce and explain the reason for showing it
- \* Explain the task or group work that will take place after the film
- \* Write some key points for reflection on the board
- \* Check that everyone can see and hear the film

A film can be divided into sections, with breaks for discussion, but learners must be warned that this will happen.

## Using guest speakers

Guest speakers can be useful, or sometimes a disaster. Careful planning is therefore needed when inviting someone to speak or present a session.

### *A speaker can:*

- \* Provide information that is essential for the session, for example, on industrial relations law or privatization
- \* Provide a change from the educator
- \* Give detailed and accurate answers to learners' questions
- \* Offer a different point of view or opinion
- \* Challenge learners' preconceived ideas and stimulate debate

*Speakers are often unpredictable, so it is important to plan them in carefully*

On the other hand, speakers may not have the right level of knowledge and not understand the level of knowledge of the learners. Speakers may confuse, fail to include any participation, and lecture without visual aids. They may also be late, or not turn up.

### **To avoid these problems, the educator needs to:**

- o **Build the speaker into a session** with an aim and learning objectives
- o **Research possible speakers** and contact them well in advance to give them time to prepare
- o **Brief the speaker carefully**, explaining the objectives and discussing how to make the presentation interactive
- o **Provide details in writing of the learners** and the course, with clear time frames
- o **Introduce the speaker**, and if possible arrange a meeting with learners in the break before the session
- o **Prepare the learners** and describe the speaker and the purpose of the session
- o **Facilitate questions and discussion**, or introduce an exercise after the speaker has finished

*Have a contingency plan in case the speaker does not arrive*



# HAND-OUT 10

## The role of the union educator

This hand-out provides ideas to assist educators to reflect on their role.

### THIS HANDOUT COVERS:

- ▶ Integrating the role of educator into the union
- ▶ Types of educators
- ▶ Evaluating the role of the educator

Every union defines and shapes the role of union educator differently depending, for example, on its financial situation, union policy and commitment to education, decision-making processes or the structures and size of the union.

*A policy to support an education programme strengthens the role of the educator*

HAND-OUTS

### Integrating the role of the educator into the union

#### Understanding the role of the union educator

The role of a union educator is exciting and challenging because the educator works directly with members and local representatives. Educators gain insight into the issues facing representatives and members at the workplace level through the use of participatory and active learning approaches.

This insight can assist in building and strengthening the union, engaging members in campaigns and improving communication strategies.

For example, learning about the issues facing women at the workplace can help to develop union gender equality policy and campaigns at the local and national levels on issues relevant for women.

Empowering shop stewards to think critically, analyse and solve workplace problems and take these skills back to the workplace means that members are well-represented and committed to the union.

Members who understand government policies and plans to take away workers' rights are more likely to participate in campaigns and other actions.

A participatory and active approach to education encourages respect and commitment because it brings representatives and members closer to the union.

They can understand better how the union operates, how it represents them and how union dues are spent. In other words, education gives them a sense of ownership of the union.

This approach means that the union educator learns from the membership, as well as providing the knowledge and skills to improve conditions at the workplace level.

***The educator does this by:***

- ✱ Demonstrating democracy and fairness
- ✱ Listening, not lecturing
- ✱ Adopting a non-discriminatory approach
- ✱ Being creative and encouraging creativity in others.

*Myles Horton said  
"We have plenty of  
men and women  
who can teach  
what they know;  
we have very few  
who can teach  
their own capacity  
to learn"*

## **Clarifying the role of the union educator**

There needs to be a clear understanding of the role of an educator within a union. If the role is not well integrated into the union's structures, that can lead to confusion or mistrust and create conflict between the educator and the leadership.

***Union leadership and other union officers need to:***

- ✱ Understand and agree with the methods or approach to union education
- ✱ Ensure that all educators have duty statements so they are clear about their role
- ✱ Be aware of the time that it takes to prepare and implement an activity and coordinate a programme
- ✱ Have confidence that union educators are open and transparent about their contact with membership

***Educators need to:***

- ➔ Have a good working knowledge of union policies, structures, the constitution and rules, procedures and activities, so that they can answer members' questions accurately
- ➔ Keep up to date with the current issues that impact on unions and carry out research on background materials for the preparation and facilitation of activities

- ➔ Attend meetings and decision-making forums to have an understanding of how policy is developed
- ➔ Be included on the working committees that develop communication strategies and campaigns, and have the opportunity to recommend education activities to support action
- ➔ Observe meetings held with members prior to collective bargaining or a dispute so that they can plan relevant activities and exercises into sessions

*Education programmes are real and relevant when an educator takes part in campaigns and demonstrations, or helps on a picket line*

***The union needs to:***

- ➔ Set parameters by clarifying the role and responsibilities of union educators in a job description and contract that is discussed and agreed with the leadership
- ➔ Provide time for educators to discuss the programme and keep the leadership informed so that they can understand clearly how their role strengthens the union

***It is also necessary to establish a reporting process:***

To ensure that the programme is transparent and accountable to the leadership and membership.

- ✱ An education committee can be formed, which includes a member of the executive committee. The education coordinator is a member of and reports to the education committee, which reports to the executive.

***or***

- ✱ The education coordinator may be a member of the executive committee or other decision-making bodies, and report directly to them.

***In both scenarios, the educator reports regularly on progress, submits plans and budgets for approval and is given direction on policy.***

## Types of union educators

***The union executive has a number of options:***

- ➔ Employ a full-time education coordinator and educators
- ➔ Give the role of education coordinator to an officer with another responsibility, such as a Deputy General Secretary
- ➔ Use local representatives or member activists as educators

Or adopt a combination of these options.

## Educator activists

This role is often given to shop stewards or members in combination with their other responsibilities as workers or union representatives. As activists, these educators often give up their free time, without remuneration, to conduct union education activities.

They are already activists in the union, and therefore have a strong sense of union commitment and ownership, and are usually involved in union decision-making bodies.

Sometimes the approach to union education creates tensions for the educator. This is often because facilitating individual and collective empowerment encourages people to think and challenge ideas.

For example, an educator activist is conducting a workshop on the environment and introduces the union policy that was agreed at the last congress:

- \* The educator was at the congress and strongly supported the policy
- \* During the discussion it becomes evident that some learners do not agree with the policy

### ***The educator has a choice***

- \* Close the discussion and inform the learners that this is the policy

***or***

- \* Allow debate and respect the different opinions, remind them that the policy has already been adopted and explain how they can challenge it within the union's decision-making structures

## Appointed educators

These educators are employed by the management of the union and are bound by a contract of employment and union policy and procedures. They conduct education activities for elected representatives and members, to whom they are accountable.

Appointed educators need to balance their employment obligations with approaches to learning that empower members and representatives to challenge what they see as unfair or do not agree with.

Conflicts can occur if they are asked to carry out an activity in a way that goes against trade union education approaches and methodology.



For example, the union leadership may ask the education coordinator to carry out a series of one-day workshops to prepare shop stewards for a round of collective negotiations:

- \* The leadership gives the educator a list of issues to include in each workshop
- \* The educator knows the target group are new shop stewards without previous training and that if all the items are included on the *list, there will be no time to practice skills or discuss issues*

***The coordinator has a choice***

- \* Do as the leaders ask and prepare series of presentations on the issues

***or***

- \* Negotiate to reduce the list or extend the workshops to two days so that some skills training can be included

## Evaluating the role of an educator

The role of an educator is normally evaluated as part of a programme evaluation and, if the educator is employed, as part of an assessment process.

Given the potential for conflict, it is useful for educators to evaluate and monitor themselves and their role. This can provide warnings of conflict and allow changes to be made before problems escalate.

## Educators activity check list

A check list can help educators to reflect on what is happening within the union and during an education activity. Conflict can be avoided and education activities become a learning experience.

The following check list suggests some questions that educators can ask themselves and use to develop their own questions.

In the union	After the activity
Does everyone in the union understand my role; am I clear about my own role as an educator?	Did the activity go as planned? Was there enough time? Was it logical? How can the design be improved?
How do I handle feedback from different people within the union? Do I feel defensive when someone challenges me? If so how can I change this?	How could I have used the experience of learners better? Were the exercises I used relevant for the target group?
Do people include me in meetings to discuss union strategies? Am I able to promote education as a tool for campaigns and other actions?	Were there any difficulties with equity and gender equality issues? If so, why did they happen and how could I have handled them better?
Am I up to date with current union issues and policies? Can I answer questions confidently and accurately?	Was I able to avoid 'being an expert who answered all the questions' and did I encourage others to answer? How can I monitor this and improve?
Are my reports timely, transparent and accurate? Do they provide useful information to the union executive? How can I improve them?	Did I listen attentively, look interested and respond with empathy? What impact did my actions have on the learners?
Am I spending enough time learning about workplace issues and talking with members at the workplace?	How did the learners leave the course? Was there a sense of achievement and collectivism? Do they understand the union better?



## HAND-OUT 11(A)

### Using role plays

#### THIS HAND-OUT DISCUSSES:

- ▶ Different types of role play and when to use them
- ▶ Planning and writing a role play
- ▶ Introducing, conducting and debriefing after the role play

Role plays create an experience or use past experience to react to different situations.

#### Through role plays, learners are able to:

- \* Put theory into practice in a secure environment
- \* Work with new information
- \* Practice skills
- \* Learn through constructive feedback and reflection

*Role playing is the closest exercise to real life experiences*

Role playing moves the power relationship from the educator to the learners, giving them greater ownership.

This learner-centred focus means that feedback comes from other learners, not just from the educator.

#### *Role playing supports learning through:*

- \* **Doing** - practicing new skills in a safe environment where mistakes can be made and corrected
- \* **Imitation** - using a model to show learners ways of using particular skills or behaviour
- \* **Feedback** - through which learners gain valuable insight into performance or behaviour from other learners and the educator
- \* **Analysis** - by participating and observing, reflecting on experience, discussing processes, principles or theory and finding ways to change or do things differently
- \* **Testing** - trying out new ways of behaving and approaching new things before transferring them back to their own lives

## Types of role playing

There are different types of role play and many ways of using them. It is important to distinguish between these different types when selecting an exercise, because the feedback and review questions will be different.

### Role play

This is where a situation is set up and specific roles are given to the learners. In these roles, people are asked to adopt set characteristics or personas.

For example: an inflexible factory supervisor shows suspicion of young people at a meeting with the newly elected union representatives to discuss procedures.

### Simulations

These are closer to real life because in the scenario learners can choose a characteristic or persona, or be themselves.

Examples: a shop steward in a negotiating exercise discusses a grievance with management, or a shop steward recruits a new member to the union.

#### Role plays and simulations can range from:

- ✦ Simple, short dialogues between one to three people; to
- ✦ Complex tasks, involving many people, which can last for one or two days.

### Pre-planned

The educator designs the activity with a written background and problem situation, role descriptions, briefings and tasks.

This gives the educator more control over the outcomes, but the problem needs to address a real situation to give the role play validity.

## Informal or spontaneous

This type of role play involves simulation, with the learners providing the details and developing the problem situation. They play themselves, or take on roles as they are developed.

This type of role play deals with real life situations, but needs careful facilitation to prevent people getting hurt or defensive.

The educator is responsible for setting the parameters and guidelines, but has less control. A high level of skill is needed by educators to prevent problems from sabotaging the learning outcome.

### **For example, in a health and safety session for shop stewards:**

- ★ Someone describes a problem they experienced at their workplace
- ★ People start to discuss what caused the problem and cannot agree on how the union should have responded
- ★ The educator writes the problem on the board and asks the learners to form two groups, one management and one union, and role play a solution to the situation
- ★ Each group nominates two or three people to take part in the role play
- ★ After ten minutes, the educator stops the role play and invites people to swap roles
- ★ The educator debriefs and reviews the outcomes and links them to the session objectives on health and safety

## Demonstrations or fishbowls

These consist of a spontaneous simulation role play in which the educator can ask for volunteers, for example to act out a skill that is being discussed.

### For example, in a negotiating session for new representatives:

- ✦ The educator asks for two volunteers to demonstrate bargaining for something in a market
- ✦ The volunteers are given an objective to represent what they are bargaining for, one takes the role of a market stallholder and the other of the buyer
- ✦ The educator sets a time frame and, when it is finished, asks the volunteers how they felt about it and facilitates a discussion on the tactics
- ✦ The educator then builds on the demonstration by noting the phases and introducing union bargaining principles

**This can be fun and helps people to relax and focus, although not everyone participates.**

## Multiple role plays or triads

These can consist of simulation or a planned role play, and can be used in a number of learning situations in areas such as communication skills, interviewing or negotiating.

- ➔ Learners are divided into groups of three, with two group members playing roles, and the third acting as an observer. The educator writes a small scenario. Learners can be allocated roles, or can adopt a persona of their choice.
- ➔ The role plays have a short time frame and take place simultaneously, with group members swapping the roles. They are given a short time to prepare.
- ➔ The educator starts the role plays, tells the learners when to change roles, and finishes them at the same time.
- ➔ In plenary, the educator debriefs and facilitates a discussion to identify learning points, difficulties, what to avoid and how to change.

*Multiple role plays are participatory because they involve everyone. They are less individually threatening and are therefore good to use for simple issues early in a course.*

**For example, in a recruiting skills session for newly elected shop stewards:**

- Groups of three include a non-member, a shop steward and an observer
- The educator has prepared cards, each with a different reason for not joining the union, and hands one out to each group member. The role play is carried out three times, with the roles changed each time
- The person playing the shop steward has five minutes to try and persuade the non-member to join, and the observer notes down the discussion points
- The educator keeps all the groups in the same room and monitors them to make sure people understand the exercise and are not having problems

**After the last role play, the educator calls the groups to plenary to debrief and facilitates a discussion on what did or did not work and why.**

## Planning and conducting a role play

Role playing has the potential to create tension because it is close to real life situations and involves feelings and emotions. To prevent it being a negative experience, the educator has to take this into account in the planning, and needs to observe the role play at all times.

## Writing the role play

Think of it as a story creating a situation which allows learners to explore ways of solving a problem or handling a specific situation using new information and skills.

Make sure that the situation is dynamic and interesting enough for learners to participate actively.

***There are a number of options:***

- ✳ A problem with several options or solutions, for which learners have to find and agree on a solution
- ✳ A situation where learners have to get information from others or influence or persuade people about something
- ✳ A critical incident in a workplace or union situation, in which learners have opposing positions and have to react or decide what to do.

*Keep the story simple, clear and related to the learning objectives*

**A written task sheet describes:**

**The background -**

This includes the information that the people taking part in the role play need, such as details about the workplace, the characters, the union office and any historical information about changes or events that people would be expected to know in that situation.

**The problem, situation or critical incident -**

This is the story or set of details about what happened to create the situation, who is involved and what they might have been doing at the time.

**The scenario -**

This needs to include details about where the role play will be played out, the time allowed, instructions and how and when the role play will be brought to an end.

**Processing the role play**

Processing is facilitated by the educator and planned into the exercise

Introduction (before)	Maintenance (during)	Debriefing (after)
Outline the objectives of the role play	Encourage learners to stay in their role	The four stages that move learners out of the role
Set and explain the ground rules and processes	Monitor feelings, tensions and group dynamics	<b>Feelings:</b> first ask those playing the major role and then others. Ask how they felt
Check understanding	Decide to stop if things go wrong, or it goes off track	<b>What happened:</b> first ask those involved to discuss what happened and why. Then ask the observers
Set the scene with the background information	Consider intervening, but only if there is a problem preventing the role play from proceeding	<b>Reflection and analysis:</b> ask questions to relate theory to practice
Write up instructions and give a hand-out for planned role plays and detailed tasks	Listen and observe, and take notes for feedback	<b>Transference:</b> ask people what they learnt and how they will apply it

**Finally**

- ➔ **Summarize**, reflecting the conclusions that the learners reached during debriefing
- ➔ **Add anything missed out** and link learning to the purpose of the role play
- ➔ **Make sure that people leave feeling positive** about the experience
- ➔ **If there are any remaining tensions**, talk to people during the break, or go back to debriefing before the next session begins





# HAND-OUT 11(B)

## Writing case studies

### THIS HAND-OUT DISCUSSES:

- ▶ When to use a case study
- ▶ How to write a case study
- ▶ Using an in-tray exercise

Case studies are used for different types of exercises. They need to be planned into an exercise and clearly written to ensure a positive learning experience.

### When to use a case study

Case studies are used, for example, in:

- \* Problem-solving exercises
- \* In-tray exercises
- \* Small group work exercises
- \* Role plays

They:

- ➔ **Motivate learners** to further develop and articulate difficult information and issues
- ➔ **Give people a sense of purpose and achievement** because they can see progress
- ➔ **Encourage collective problem solving**, leading to action that can be transferred to the workplace or union
- ➔ **Relate practice to theory** and help learners to recall and apply knowledge from their experience and the session or course
- ➔ **Develop initiative and creative thinking** because the tasks lead people to think for themselves about options and different ways of doing things

## How to write a case study

### **Guiding principles:**

- ✦ Make the case study challenging, but without hidden tricks that distract from the learning
- ✦ Write clearly in a language and style that is appropriate for the learners
- ✦ Ensure there is more than one way to solve the problem, or there are a number of possible options
- ✦ Avoid questions (factual) with only right or wrong answers

*The exercise and the case study are part of the task sheet hand-out*

### **When writing the story:**

Omit information only ***if the task requires people to ask questions about what is missing.***

- ➔ Relate the story and the task to the learning objectives
- ➔ Give the people in the case study a name, a position and a brief character description
- ➔ Put the information in a logical/historical sequence so that it is easy to follow
- ➔ Limit the information to what the learners need to do the task
- ➔ Make the characters and the situation 'real to life' so that they are plausible in the story
- ➔ Keep the number of characters to a realistic number - do not include characters that are irrelevant to the task or story

*Confusing case studies distract from the task and the learning outcomes*

### **The case study has:**

- Characters
- A story
- A problem

A long role play can have a number of characters, but for a short exercise the characters should be limited. Too many characters may make things confusing.

### **Make the story logical and not too complicated:**

Otherwise the learners focus on trying to understand the case study, rather than on how to carry out the task.

***The exercise task sheet contains:***

- A purpose
- An introduction
- A story
- Questions
- Instructions concerning time frames and preparation
- Guidelines for participating in the role play or task
- Instructions for reporting back, reviewing and feedback

## Using an in-tray exercise

In-tray exercises are useful for developing individual and collective skills in communication, organizing and analysing data, planning or time management.

The purpose is to assist learners to practice handling complex or numerous pieces of information in a limited time, depending on their position.

This exercise can be any length, but needs a time limit and can be done in groups or individually. It is necessary to report back to discuss the different outcomes of the groups or individuals.

The story contains a background situation at the workplace or union and the position of a person who has something to do. It does not need a character description.

***Tasks can include:***

- Prioritizing workloads
- Drafting replies
- Delegating tasks
- Recommending actions
- A list of tasks that, for example, a shop steward or an educator has to deal with

The task includes a list of items that something has to be done with, such as memos from the General Secretary, e-mails or phone calls from a member, copies of correspondence with requests or a list of tasks the person has to do in the next week or month.

Learners usually work in groups but can also work individually or in pairs.

**For example, in a session on union administration:**

*The target group for the session is union administration staff and the purpose of the session is to assist administrators to develop efficient organizational skills.*

**In the first part of the session, the educator gives a presentation on time management and managing correspondence in a union context.**

The educator hands out and explains the task sheet with attachments: (1) e-mail requests from the General Secretary; (2) a list of the jobs that the administrator needs to do in the next two weeks; and (3) a copy of the duty statement for administration staff.

The story or background establishes that the union is planning a strike that will affect many members. The union is in the middle of a campaign against changes to labour laws and the union President is on sick leave. There are two administration staff members.

**The task sheet asks learners in small groups to:**

- \* Read through the e-mails, the job list and the duty statement
- \* Discuss these in relation to the background story
- \* Develop a work plan for the next two weeks and explain how and why priorities were identified, what can be delegated and why any items were postponed
- \* Identify any resource constraints or task clashes
- \* Give each item a deadline and an estimated time for completion
- \* Write the work plan on a flip chart and select a group member/s to report back

**The groups have 40 minutes to do the task.**



# HAND-OUT 12

## Evaluating a session

### THIS HAND-OUT DISCUSSES:

- ▶ Why evaluate a session?
- ▶ How and what to evaluate
- ▶ Recording and using the information

Evaluating a session can be done at the same time as course evaluation, but it is more proactive if carried out by the educators during and directly after the session. This is especially important if the educator is not one of the course educators.

*Session evaluation is the first part of the evaluation process and is part of monitoring a course*

### Why evaluate a session?

#### Session evaluation:

- ★ Contributes to course evaluation
- ★ Is part of monitoring a course or workshop
- ★ Is a useful reference for improving a session
- ★ Gives educators feedback on their own skills

Evaluation at this level gives educators information on people's reactions or feelings about the learning situation. ***It cannot provide information on the long-term learning impact.***

Importantly, it assists educators to improve their interaction with learners and to manage the learning environment.

### What and how to evaluate

Information about session evaluation is mainly gathered by educators through ***observation and listening.***

#### ***Before the session***

At the beginning of a session, give a brief explanation of the purpose of evaluation and how the information will be used to improve the session.

***At the end of the session ask learners:***

About their feelings

Put up a flip chart with a short list of questions and boxes to tick, or a drawing of a temperature gauge for people to mark how hot or cold they felt about the session, leaving space for comments.

How they felt about the exercises or tasks

Use plenary questions and discussion, and note down the responses on the board or in a note book (this can be done quickly directly after a task).

*Keep it simple - if the process is too long or complex, people get bored and give repetitive responses*

What they gained from the session or felt was missing

Have a short plenary discussion at the end of a session. Ask the learners to use post-it notes or write on the flip chart.

One option is to hand out a short questionnaire after each session and for learners to complete it and hand it in. **But this can be repetitive. Learners do it because they have to, or forget to do it.**

## Observation

***Focus on:***

- ★ **The logic of the session design.** Did learners look confused? Were they able to follow the stages of the session, and was there sufficient or too much information?
- ★ **The presentation of information and use of visual aids.** How well did learners contribute to plenary discussions and did they use the information to complete the tasks? Was there too much detail on the visual aid?
- ★ **The exercises and tasks:** did learners have problems understanding the instructions or carrying out the task? Were they able to finish in the time allocated, or was there too much detail or too many questions in the exercise?

- \* **The level of detail when reporting back:** were groups or individuals able to answer the questions and respond to questions as anticipated?
- \* **The timing of the different parts of the session:** did presentations or exercises take longer than estimated? Did people seem to be under pressure?
- \* **The general environment and atmosphere:** were people contributing, fidgeting or losing concentration. Were there constant interruptions, or body language that demonstrated that people were uncomfortable. Were women and young learners able to contribute to the discussions?

## Recording and using information

Take notes during or immediately after the session, including observations and responses from learners, with any information from flip charts.

Use the notes to analyse the session and record ideas on how to improve the session or the performance of the educators. Use them to compile the course report and file for future reference.

Educators can also make a personal check list on how to improve their own knowledge, skills, behaviour and attitudes.

*Evaluation is a waste of time if the information is not used to make changes that improve a session*







# INFORMATION SHEET 1

## Introducing the main tasks

### THIS INFORMATION SHEET IS FOR THE EDUCATOR AND DESCRIBES:

- ▶ The purpose of the three main tasks
- ▶ Setting the environment for the tasks
- ▶ Reviewing and giving feedback

*This information assists the educator to explain the purpose of the tasks at the beginning of the course and to put people at ease about the process.*

*The tasks put theory into practice*

### ■ Purpose of the three main tasks

The three tasks assist the learners to meet the learning objectives by providing them with the opportunity to practice and repeat the skills covered in the course.

The tasks reinforce the major theme of the course.

***They use learner-centred methods and exercises that actively involve people in their own learning and encourage them to work collectively.***

*Learners observe the educator putting theory into practice*

The tasks have a logical order within the course. They start with a simple presentation using a visual aid and finish with a full session that uses all the skills and information discussed during the course.

Learners develop confidence as individuals and gain experience of working in groups.

### Task 1

- \* An individual short presentation asking learners to provide some simple information of their union education programme or a union topic using a visual aid.
- \* The helps learners to overcome the initial nervousness of presenting in front of peers.
- \* It also provides a comparison with the use of interactive methods in the following tasks, and reinforces the benefits and impact of participation.

## Task 2

- ✦ Learners work as individuals or in small groups (maximum 3), depending on number of people in the course.
- ✦ Learners are asked to give a 20 minute session with visual aids, a short exercise and one learning objective, using a basic union topic
- ✦ Learners are assisted to begin the process of structuring a session with an interactive exercise.
- ✦ Note that it is difficult to change from a lecturing style to learner-centred methods. The educator therefore needs to give constructive and encouraging feedback.

## Task 3

- ✦ Learners work in small groups (maximum 4).
- ✦ The groups are asked to include a short exercise, a presentation with visual aids and a longer exercise using a multiple role play, a case study or a DVD, that will provide an opportunity to practice a skill on a union issue
- ✦ The learners practice designing and writing a session plan with an aim and learning objectives.

## ■ Setting the environment

The tasks are similar to a role play and the learners therefore need to be prepared for the experience.

The 'close to real life experience' puts pressure on people and increases anxiety. Establishing a secure and respectful environment during the course helps to minimize anxieties and make the tasks a positive experience.

***The educator needs to monitor the groups regularly during the preparation time, but should only intervene if the groups request assistance or are evidently having problems.***

***The educator can use the following strategies to minimize tension:***

- ➔ ***Introduce the tasks*** at the beginning of the course and before each task.

*Recall your own first experience in front of a group*

*Empathize with the learners*

- ➔ **Give clear detailed instructions**, check that there are no misunderstandings and always hand out a task sheet.
- ➔ Provide opportunities for the **learners to ask questions** before they start preparing the task.
- ➔ Emphasize the **importance of not letting preparation time run into presentation time**, and therefore remind learners to be punctual.
- ➔ Explain that **the tasks do not ask people to do anything that has not been covered in the course**. Remind learners of the parts of the course that are relevant to each task.
- ➔ Encourage learners **to use familiar information** for each task so as not to use up preparation time for research. For example, in the first task, ask them to speak about their union, and for tasks 2 and 3 ask them to select an issue/skill that they have used before.
- ➔ Explain that **the purpose of the tasks is to provide experience**, not to give marks or identify the best presentation. The tasks give learners the opportunity to make personal assessments of their progress and identify what needs improving.
- ➔ Emphasize that there is **no such thing as the perfect session**. All educators, however experienced, need to evaluate continually what they do in order to improve.
- ➔ Raise the point that **people also learn from watching others**, as everyone does things differently. Remind them that **personal criticisms or comparisons are not welcome**.
- ➔ If the equipment is available, ask learners if they would like their presentations to be recorded so that they can take them home, but assure them that no one will be recorded if they do not want to be.

*If a person appears very nervous, speak to that person privately to give encouragement and support*

**The task sheets are examples and may need amending to suit the type of course and timetable.**



## INFORMATION SHEET 2

### Instructions for reviewing tasks

*This information sheet is for the educator and describes appropriate methods of giving feedback and reviewing the outcome of the tasks.*

- ▶ Reviewing the presentations
- ▶ Processing feedback

One of the aims of the tasks is to build up and strengthen the confidence of learners. Providing constructive and sensitive feedback helps people to learn.

**Remember:**

*Learning is easier when people can be successful;*

*People learn from praise, not criticism.*

*Judgemental statements, a competitive environment and negative criticisms are barriers to learning.*

## ■ Reviewing the presentations

*(Giving feedback to individuals or groups)*

Reviewing a presentation involves learners analysing their own presentations. Questions therefore need to be asked. Telling people what they should or should not have done is not helpful.

Look for the positives and raise them first (people usually know where they went wrong).

**Sample questions include:**

- ‘What was the best part of the presentation in your view?’
- ‘What would you like to improve on?’
- ‘Why did you do it like that?’
- ‘Can you think of another way of doing it?’
- ‘What happened when you did that? How did the learners react?’

**Show respect.**

*Ask yourself how you would like to be treated.*

## ■ Processing feedback

### Before the presentation

- \* Explain the feedback process and the steps to be taken
- \* Ask learners to observe and listen carefully to the presentation that is being given
- \* Ask them to role play learners as realistically as possible and not to make it difficult for the presenter
- \* Set the criteria for the feedback, list them on the board and ask people to focus on them during the presentation

### After the presentation

*(The educator is always the last person to provide feedback)*

*Do not repeat or contradict what others have said.*

*Acknowledge responses and, if you do not agree, ask if anyone has an alternative view.*



#### Step 1

- ➔ Ask the learners how they felt making the presentation and encourage them to speak about their feelings first
- ➔ Then ask them what went well and what could have been improved

**Prevent others from intervening at this stage.**



#### Step 2

- ➔ Ask other people how they felt about role playing the learners and what the best parts of the presentation were
- ➔ Set time frames for the feedback
- ➔ Sometimes people need encouragement to make comments

**Prevent negative or judgmental criticism or comparisons and, if such comments are made, ask learners to re-phrase them.**



#### Step 3

- ➔ The educator now provides feedback, first emphasizing the positive aspects
- ➔ The educator then asks questions about what could be improved or changed
- ➔ Finally, the educator summarizes with **general points** that learners can consider for the future



# TASK SHEET 1

## Giving a ten minute presentation

### THIS TASK AIMS TO GIVE YOU THE OPPORTUNITY TO:

- ▶ Share information about your union education programme
- ▶ Practice preparing and presenting information in a session using a visual aid

### Preparation

Decide how to describe your union education programme, for example including the size of the programme, types of activities, target groups, topics and educators.

Give the presentation a structure with a:

- ★ **Beginning** (introduce yourself and what you will talk about)
- ★ **Middle** (describe key points of the union education programme)
- ★ **End** (conclude by summing up the key points)

**Make notes** to guide you through the presentation and use at least one visual aid.

**Think about your presentation style**, for example, speed, tone of voice, eye contact and enthusiasm.

*The educator will give you a three minute warning before your time is up*

#### Remember

Ten minutes is very short

Keep it simple and try not to include too much information.

### Review

Feedback will be given on the structure of the presentation, delivery and use of visual aids. You will be asked first to comment on your presentation.

### Time frame

🕒 Preparation: one hour

🕒 Presentation: ten minutes

■ Materials are provided in the training room.

■ Ask the educator if you need any assistance.



## TASK SHEET 2

### Conducting a 20 minute session

#### THIS TASK AIMS TO GIVE YOU THE OPPORTUNITY TO PRACTICE:

- ▶ Writing learning objectives
- ▶ Using visual aids
- ▶ Writing and using an exercise with a presentation

#### Preparation

- \* Select a familiar union topic and choose a part of the topic suitable for a 20 minute session (for example union meetings, recruitment, union principles)
- \* Nominate and describe the target group
- \* Write one learning objective and prepare a visual aid

#### Include in the session:

- \* A short exercise to find out people's experience on the topic
- \* Record responses on a board or flip chart
- \* Provide some information using a visual aid
- \* Summarize the session

**Write a plan** to guide you through the session. Give it a structure with a beginning, middle and end.

**Think about your listening and observation skills** and how you will respond to the responses of learners

#### Remember

20 minutes is a very short session – keep it simple

## Conducting the session

The learners for your session are the course participants, who role play your learners. The educator will indicate when there are five minutes remaining.

## Review

Feedback will be given on how you involved the learners, the type of questions you asked, the logic of the session and the visual aid.

🕒 Preparation time is 60 minutes.

- **Materials are provided in the training room.**
- **Ask the educator if you need anything.**





## TASK SHEET 3

### Conducting a 40 minute session

**THIS TASK AIMS TO GIVE YOU THE OPPORTUNITY TO PRACTICE CONDUCTING A COMPLETE SESSION:**

- ▶ Writing learning objectives and a session plan
- ▶ Writing and using long and short exercises

### Preparation

*Work in your nominated group to prepare and present the session sharing the tasks.*

- \* Discuss and select a topic for a course for shop stewards or members
- \* Identify and describe the target group
- \* Write **two** learning objectives
- \* Discuss and select one short exercise to find out people's experience and one longer exercise that practices a skill
- \* Write a session plan to hand out to the plenary
- \* Prepare to give at least ten minutes information with visual aids

#### Remember

- \* Do not to try to fit a 90 minute session into a 40 minute session
- \* Try something new - be creative
- \* The long exercise should be a multiple role play, a task with a case study or a DVD with a discussion
- \* Use the board or flip chart as visual aids

## Conducting the session

You will conduct the session using the members of the other groups as your learners.

## Review

Feedback will be given on how you involved the learners, the relevance of the objectives, the type of questions you asked and how you handled responses, the logic and flow of the session and time management

- 🕒 Preparation time is 1½ hours
- 🕒 Presentations are strictly 40 minutes, followed by a five minute review
- Materials are provided in the training room - the educator will monitor the groups
- Ask the educator if you need anything

# Module Two:

## Advanced course for educators



- ▶ **Course description**
- ▶ **Sessions**
- ▶ **Information for educators/hand-outs**
- ▶ **Task sheets**





# > Module Two > contents

Advanced course for educators

Course description .....	i
Timetable .....	iv



SESSION ONE: Welcome and introductions .....	1
SESSION TWO: Talking about union education .....	6
SESSION THREE: Writing and asking questions .....	10
SESSION FOUR: Applying action methods to theory .....	13
SESSION FIVE: Problem solving through role playing .....	17
SESSION SIX: Course design .....	20
SESSION SEVEN: Evaluating a course .....	24



HAND-OUT 13(A): Adult education theory .....	1
HAND-OUT 13(B): Learning to learn .....	9
HAND-OUT 14: Using questions in discussion .....	17
HAND-OUT 15: Using action method exercises .....	21
HAND-OUT 16: Problem solving with role play .....	29
HAND-OUT 17: Course design .....	37
HAND-OUT 18: Evaluating a course .....	49



TASK SHEET 1: Designing an action method exercise .....	1
TASK 2: Writing and conducting a role play .....	2
TASK 3: Designing a course .....	4
TASK 4: Conducting a 60 minute session .....	6





## Course description

### ■ Target group

- Experienced educators whose main role in the union education programme is designing and implementing education courses and workshops
- It is preferable for participants to have attended Module One, or to have at least two years' experience as educators

*Every course should aim for equal gender representation.*

### ■ Outcome

Union educators will be able to design, implement and evaluate a range of courses and workshops for the education programme that are relevant to the union and use a variety of participatory exercises.

### ■ Description

This course builds on the information and skills begun in Module One by:

- Examining the ideological and theoretical basis for a participatory learner-focused approach to union education
- Strengthening the skills and knowledge base of educators to design courses and workshops based on the needs of the union

*This Module is a prerequisite for Module Three*

- There should be **a maximum of 15 learners** per course to allow time for the practice sessions
- The Module can be conducted as **a four-day residential or a five-day non-residential** course, or as two **non-residential three-day courses**.

The course is designed around four practical tasks for small groups.

*Module Two follows on from Module One, expanding the knowledge and skills for using participatory exercises*

***These include:***

1. Writing and conducting an action method exercise
2. Designing and conducting a problem-solving role play
3. Designing a training course or workshop on a topic relevant to the union
4. Conducting a 60 minute session based on the course design exercise.

Learners work on course materials that can be adapted to their own union education programmes.

*Refer to and use the task information sheets from Module One to set up and manage the tasks*

## ■ Learning objectives

***At the end of the course learners will be able to:***

- Discuss the role that education plays in strengthening the union to represent members and implement union policy and actions
- Explain the theories and ideology that inform participatory and learner-centred education
- Design and facilitate action methods that allow learners to share and discuss information and ideas in order to find solutions and ways forward for union problems
- Plan and design courses and other union activities for an education programme that delivers the skills and knowledge needed by the target group
- Use role plays for problem-solving situations and provide constructive feedback and reviews
- Plan an evaluation process for courses and sessions that provides accountability to the union and to learners

## ■ The hand-outs

The hand-outs provide educators with background knowledge for conducting the sessions and can be printed as they are, or adapted to suit the target group. They provide examples of exercises and options for planning courses.



## ■ Session plans

The individual session plans offer an example of how to follow the hand-outs and timetable. ***They should always be adapted to suit the target group.***

### Each session plan:

- Explains the learning outcomes
- Identifies key points and information that need to be covered in each session
- Suggests ideas for exercises

The 'Welcome and introductions' session assists in establishing a positive learning environment and includes an ice-breaker that demonstrates a method for sharing experiences of learning in plenary. The following session on 'Talking about union education' links theory to practice and assists learners to promote the role of education in the union.

Each session follows the principles of popular or radical education, and begins with an activity that either creates an experience or allows learners to share their experiences and knowledge of the issues to be covered.

The course uses some of the hand-outs from Module One, as indicated in the session plan.

The group tasks and presentations allow ideas to be shared, and also offer the opportunity for learners to work with materials that are useful for their own union.

Each session ends with a summary of the learners' input, in the form of feedback or a discussion, so that everyone can leave the session with a sense of achievement.

# Timetable

Basic training for educators course timetable (residential)				
Day One	Day Two	Day Three	Day Four	Day Five
<p>1. Welcome and introductions</p> <p><b>Ice-breaker</b> <b>Tree of experience</b> Sharing union education experiences and expectations</p> <p>Administration and course description</p>	<p>3. Questions <i>Information and role play</i></p> <p>4. Applying action methods to theory <i>Plenary discussion and information</i> <i>Small group work</i></p>	<p>Task 2: Writing and conducting a role play</p> <p>6. Course design <i>Information and plenary discussion</i></p>	<p>7. Evaluating a course</p> <p>Task 4: Conducting a 60 minute session <i>Using an action method and a problem-solving exercise</i></p> <p>Preparation</p>	<p><i>Presentations (cont.)</i></p> <p>Feedback and review</p>
Lunch	Lunch	Lunch	Lunch	Lunch
<p>2. Talking about union education</p> <p><i>Discussion, presentations and group exercises</i></p> <p><i>Distribute Hand-outs Nos 13(a) and (b)</i></p>	<p>Task 1: Designing an action method exercise</p> <p>5. Problem solving through role playing <i>Information and plenary discussion</i></p>	<p>Task 3: Designing a course</p> <p>Preparation</p> <p>Presentations</p> <p>Review and feedback on Task 1</p>	<p>Preparation</p> <p>Presentations</p>	<p>Course evaluation and closure</p>



# SESSION ONE

## Welcome and introductions

 **3 Hours**



### Aim:

- ➔ To establish an environment that supports the learning process

### Learning objectives: at the end of the session learners will be able to:

- ➔ Identify the importance of using introductions in a course
- ➔ Explore ways of identifying the expectations and experience of learners
- ➔ Demonstrate a democratic approach to education

### Materials:

- Flip chart, board and markers
- Name cards, coloured cards and a marker for each learner
- Hand-outs Nos 1 and 2, course timetable and description

### Prepare:

(1) Cards with pens and three flip charts for 'Getting to know you; (2) materials and 'Tree of experience' flip charts

**Key points and information**

Ask learners as they come into the room to write the name they want to be called by on a blank card with a marker pen

Start the session with some simple introductory questions and ask people to be brief

If the learners come from other countries, a round of each person saying hello and naming each person in the room can assist in learning names

This exercise encourages learners to move around the room, talk to others and share their experiences of being part of a union

- ▶ Write the three sentences below on different flip charts and put them on a wall next to each other
- ▶ Cut post card size coloured cards and place on a spare table with marker pens and masking tape

**Finish each sentence in a few words**

'I joined a union when I realized-----'

'I am a union educator because -----'

'My inspiration for union activism comes from -----'

**Facilitate a short discussion on the themes that emerge.**

*This is a long exercise. The tea break can be included after step 3, or at the end of the exercise, depending when the session started.*

Before the session

- ▶ Select a large empty wall in the training room. Put up six to ten pieces of flip chart paper and draw the outline of a tree with roots, a trunk and branches, and a space above for clouds.

**Plan and exercises****Introductions**

Write on the board or flip chart a list of points for learners to refer to, such as:

Name/union/position in union/sector/country or region/first language

Ask for a volunteer to start, or nominate someone

🕒 **TOTAL TIME: 10 minutes**

**Getting to know you exercise**

Explain the purpose of the exercise.

Ask the learners to:

- ▶ Go to the table with the cards and pens and take three cards and a marker
- ▶ Finish the sentences written on the flip chart papers and write each response on a different card (5 minutes)
- ▶ Ask the learners to form into groups of three to share the information on their cards (5 minutes)
- ▶ Ask the learners to change groups and to continue sharing. Repeat this one more time.
- ▶ Direct the learners to paste the cards onto the relevant flip chart and to read any cards that they have not seen in their groups

🕒 **TOTAL TIME: 30 minutes**

**The tree of experience exercise**

Explain that:

- ▶ The purpose of the exercise is to create a mural of a tree filled with learners' experiences written on coloured paper shapes
- ▶ The roots, trunk, branches and buds will each represent a different type of experience

## Key points and information

- On a table near the tree, place five packets of different coloured A4 sheets of paper, five pairs of scissors, different coloured marker pens and masking tape or Blu Tack.

Briefly summarize after each stage of the exercise.

### After Step 5

Explain that the tree represents the collective experience of everyone and the total number of learners' ages represents the years of experience available to use during the course.

Explain that the method and approaches used in trade union education ensure that we learn collectively and that all adults, whatever their education level have valuable life experiences.

Tell people that this course examines approaches to adult education in more detail.

**Describe how different images and questions can be used for the same exercise, such as a building with foundations, walls, floors, roof etc., or a ship**

## Plan and exercises

- The exercise will be in five steps and learners will work individually. Between each stage there will be plenary sharing and discussion
- People can cut their own shapes from the paper, but the colour will be the same for each level

***Between each stage, ask learners to paste their piece of paper on the relevant part of the tree, and facilitate explanations of what they have written.***

### Before each stage write the question on the board

- Nominate the colour for the roots and ask each learner to cut a strip or shape from the paper and write one or two words about '*the most important value you learnt as a child from your family*'.
- Repeat the process with a different colour for the trunk about '*the most important knowledge and skills you learnt in formal education*'.
- Repeat the process with a different colour for the branches about '*the most important attitudinal change you went through as a result of being a trade unionist*'.
- Repeat the process with a different colour for the buds about '*what you expect to learn from this course*'.
- Repeat the process with a different colour for rain drops falling on the tree about '*the skills and knowledge you can contribute to this course*'.

## Key points and information

Explain that, as the course includes four group tasks, it is important to establish guidelines for working well together without fear or insecurity.

Facilitate the exercise to assist people to reach a consensus on the types of attitude and behaviour that ensure positive group work experiences.

Raise issues of gender equality, harassment and discrimination if they are not raised by learners.

***Alternatively**, using the first question, ask individuals to write one point on a card and paste it on an identified space. Ask the group to link similar responses together and add any other issues that they or you think are important. Put the cards on a flip chart paper headed 'Guidelines for working in groups' and ask learners to raise their hands if they are in agreement*

**In longer courses, this exercise can be extended into one session. Learners can be divided into two groups and asked to prepare a mime or sculpture to represent what attitudes or behaviour create a good or bad learning environment, with the other group being asked to guess what is being demonstrated. Follow up with a discussion and a charter of behaviour**

## Plan and exercises

Ask people to remain standing around the tree, add all their ages together and write a total on the board.

Ask the learners why they think it is important in union education to use and value peoples' experience. Facilitate a short discussion.

**Finally, explore how people felt about participating in the exercise, and how they felt the environment had changed.**

🕒 **TOTAL TIME: 60 minutes**

### Working in groups

Divide learners into groups of four to discuss their positive and negative experiences of working in a group situation.

Join the groups together to form two groups.

Write the questions on the board.

- ▶ Ask Group 1 to list the different ways they would like to be treated by others during the course.
- ▶ Ask Group 2 to list the attitudes and behaviour that create barriers to learning and contributing.

After they have reported back, facilitate a discussion to compare the responses and reach consensus on the values and behaviour needed in group work.

Paste the flip charts on the wall for people to refer to during the course.

🕒 **TOTAL TIME: 20 minutes**

### Key points and information

Link the aim and objectives to the expectations on the tree, and discuss whether it is possible to make any changes to the course.

To demonstrate democracy, ask the learners whether they would like to set starting or finishing times collectively, taking into account venue requirements.

Leave the room to let the group discuss how a committee might work. Handing over some decision making to learners helps to create a more democratic environment.

### Plan and exercises

#### Plenary presentation

Course aim and objectives, timetable, sessions  
Starting, break and finishing times, and any free time built into the course.

Description of the purpose and processes of the major tasks and presentations.

Administrative details.

#### Setting up a course committee:

Explain the purpose and ask the learners to work out themselves how or whether they want to organize such a committee, and what questions or suggestions they have (see Hand-out No. 2).

 **TOTAL TIME: 60 minutes**



## SESSION TWO

### Talking about union education

 3 Hours



#### Aim:

- ➔ To assist educators to discuss the purpose and approaches to union education

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Identify the differences between adult and union education, and use an approach that is consistent with union principles
- ➔ Discuss how union education can strengthen union action
- ➔ Analyse their union's education approach and strategies

#### Materials:

- Flip chart, board and markers, coloured paper or cards
- Hand-outs Nos 13( a) and (b): Introduction, Part B

#### Prepare:

(1) a presentation from Hand-out No. 13(a), pp. 1 and 2 with visual aids: (2) a presentation from Hand-out No. 13(a) pp. 3-6: (3) task sheet for discussion groups in the second part of the session



## Key points and information

*Alternatively, ask groups to write on separate cards the points that differentiated school from adult education and paste them onto a flip chart. Use the responses in the discussion.*

Find a space for people to move their chairs into a circle.

### *Staying in the circle*

Summarize the discussion by referring to the previous discussion.

## Plan and exercises

### Buzz group exercise

- ▶ Divide the learners into groups of four while remaining in their seats

### Ask each group to:

- ▶ Share any education or training courses they attended as an adult
- ▶ Discuss what made them different from school

🕒 (10 minutes)

Ask people to bring their chairs and form a circle in the selected space.

Facilitate a discussion to draw out the differences between schooling and adult education by asking probing questions, such as:

- ▶ How did you feel about attending education courses as an adult?
- ▶ Why did you attend these courses?
- ▶ How and where did you apply what you learnt in the course?
- ▶ What changes did they bring about in your life?

🕒 (20 minutes)

### First presentation: Types of adult education

Ask questions to find out what type of adult education programmes learners have in their countries/regions.

🕒 (15 minutes)

🕒 **TOTAL TIME: 45 minutes**

**Key points and information**

Summarize the four traditions of adult education.

***If the course has more than 15 learners, divide them into two groups with an educator to facilitate the discussion in each group.***

***Spend five minutes at the end of the session comparing the discussion points.***

Summarize by explaining how the three parties in union education influence how we select methods from the different traditions, using the diagram in Hand-out No. 13(a).

**15 minute break**

This exercise offers learners the opportunity to discuss the different ways that education can strengthen a union.

*Write the following names of the sections from the Introduction, Part B, on the board:*

Union education as part of union strategy

The role of union education in providing knowledge and skills

The role of union education in involving workers and members

The role of union education in prompting campaigning in the world of today

The role of union education in making unions relevant and accessible

***If there are more than four groups, shorten the time for reporting back.***

Summarize by asking learners whether they will be able to use the points to promote union education.

**Plan and exercises****Second presentation with plenary discussion**

During the presentation, ask people to relate each tradition to the types of adult education they have in their country/ies.

🕒 (20 minutes)

**Group discussion**

*In a circle:*

- ▶ Ask learners to think for a few minutes about their union's education programme and how it compares with the four traditions
- ▶ Invite them to share their thoughts
- ▶ Facilitate a general discussion focusing on which traditions are relevant for union education, why it is useful to select from different traditions and why it helps to understand where methods come from

🕒 (25 minutes)

🕒 **TOTAL TIME: 45 minutes**

- ▶ Ask learners to divide themselves into groups of equal numbers

- ▶ Ask the groups to select a section written on the board

- ▶ Make sure that each group has a different section

- ▶ Hand out the task sheet (attached)

🕒 (40 minutes preparation)

**Reporting back**

Monitor the time and prevent groups from going over ten minutes

🕒 (65 minutes for the presentations and a summary)

🕒 **TOTAL TIME: 105 minutes**

## Task sheet

In your selected group:

### 1. Read the section you have selected

- \* Use the discussion points at the end of the section to guide your group discussion
- \* Make notes on whether you agree with the points raised, would like to change them or to add other points
- \* Use the notes for preparing to report back

### 2. Read the example on the back of the section

- \* Discuss other examples that are relevant to your own unions
- \* Write an example that reflects the issues in your sector and union

### 3. Prepare a report back presentation with a visual aid that:

- \* Summarizes your comments, changes or additions to the section
- \* Describes your example

## You have

**40 minutes to complete the task**

**10 minutes to report back**

(Share the presentation between the group members)



## SESSION THREE

### Writing and asking questions

 1 ½ Hours



#### Aim:

- ➔ To assist educators to prepare and use visual aids in sessions in support of learning processes

#### Learning objectives: at the end of the session and the course, learners will be able to:

- ➔ Write questions for exercises that have a purpose and clarity
- ➔ Ask questions and give responses that facilitate discussion and learning

#### Materials:

- Flip chart, board and markers, a visual aid
- Hand-outs Nos 7(c) and 14

#### Prepare:

(1) first presentation with a visual aid on Hand-out No.7(c): (2) second presentation with a visual aid on Hand-out No. 14: (3) write a task sheet for the question exercise

## Key points and information

Explain that it is best to link theory to experience, but that it is not always easy to know what experience people have.

The role play creates the experience, which is then linked to theory.

### During the discussion

With reference to the visual aid from the first presentation, ask learners which category their question fitted into and explore how to anticipate reactions to different types of questions.

If the reaction was unexpected, ask the learners how they could have rephrased the question

## Plan and exercises

### Presentation

Give examples of the types of questions, or ask learners for examples during the presentation

🕒 15 minutes

### Questioning role play (to create experience)

The purpose of the role play is to identify peoples' immediate response to a question

- ▶ Divide learners into groups of a maximum of four
- ▶ Ask each group to: (1) prepare a question to start a discussion on the role of a shop steward; and (2) select a group member to ask the question and respond to the answers (10 minutes)
- ▶ Ask the groups to form a circle, and explain that each group will ask the question to the other groups that are role playing shop stewards
- ▶ The educator stops the role play with a clap after five minutes

Debrief the role play by inquiring how the person asking the question felt and whether the response was what they anticipated. Then ask learners how they felt answering the question.

Facilitate a discussion on the reactions to the questions and responses.

🕒 (30 minutes)

🕒 **TOTAL TIME: 45 Minutes**

## Key points and information

During the presentation, refer to the questions raised in the sessions on day 1 of the course.

**Summarize by emphasizing the importance of thinking about the type and form of questions for exercises, and encourage learners to test questions before using them in an exercise.**

## Plan and exercises

### Presentation

Give examples of probing questions, or ask the learners for ideas

🕒 (10 minutes)

### Writing a question exercise

- ▶ Divide the learners into three groups
- ▶ Ask each group to: select a topic in a session to recruit potential union members; compose a probing question to initiate a discussion; and write the question on a sheet of A4 paper and paste it on the board

🕒 (20 minutes)

Ask learners to look at the questions and identify how they would respond to them.

Facilitate a discussion on the clarity and type of questions, how people are likely to respond to them and how the questions can be amended.

🕒 (15 minutes)

🕒 **TOTAL TIME: 45 minutes**



## SESSION FOUR

### Applying action methods to theory

 **3 Hours**



#### Aim:

- ➔ To encourage educators to use a variety of action methods that engage learners in a meaningful way

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Use discussion in exercises that can lead to action
- ➔ Describe and use the guidelines to conduct the action method exercises
- ➔ Write action method exercises to use in shop steward training

#### Materials:

- Flip chart, board and markers
- A disposable plastic cup, coloured cards/paper and masking tape or Blu Tack
- Hand-out No. 15 and task sheet exercise 1

#### Prepare:

(1) first presentation with a visual aid on Hand-out No. 15, pp. 1 and 2; (2) second presentation with a visual aid on Hand-out No. 15 pp. 3-7; (3) third presentation on Hand-out No. 15 p. 8; (4) amend task sheet exercise 1, if necessary.

## Key points and information

The session does not include a presentation on the theories in Hand-outs Nos 13(a) and (b). The educator facilitates a discussion on these at the end of the session.

Check with the learners during the discussion and ask whether they are contributing their own ideas and building on, rather than repeating what others say.

During the discussion, ask learners questions about validity, such as: Are you sure of that? What are your reasons for saying that? Do you really mean that?



30 minute break

## Plan and exercises

### Exercise on facilitating a discussion

#### Step 1

- ▶ Ask the learners to move from their seats and pair up with someone they have not worked with before
- ▶ Ask the pairs to take it in turns to learn more about their role as an educator by asking each other questions
- ▶ Ask each pair to join with another pair and continue with the discussion on their role as educators, but by replacing 'I' with 'We' before speaking

Facilitate a discussion about the difference in the discussion when sentences are started with 'We' rather than 'I'.

🕒 (30 minutes)

#### Step 2

### First presentation on discussion as dialogue

Link the presentation to the previous exercise and to the discussions on day 1 of the course.

🕒 (15 minutes)

🕒 **TOTAL TIME: 45 minutes**

#### Step 3

- ▶ Ask the learners to bring their chairs into a circle and place the disposable cup in the centre of the circle
- ▶ Invite them to talk about how they relate to the cup and what it represents to them through discussion
- ▶ Ask the learners to think about truth and sincerity when they are replying, and ask them whether this changes their responses

🕒 (30 minutes)

At the end of the session ask the learners how they felt about the exercise, what they have learnt from it and whether it has changed their perception about discussions.

🕒 (15 minutes)

🕒 **TOTAL TIME: 45 minutes**



**Key points and information**

*Give a demonstration of an action method before describing it.*

Prepare and give a brief presentation on guidelines for using action methods (Hand-out No. 15 p. 8).

**Give out Hand-out No. 15**

**Plan and exercises**

Second presentation on types of action methods

Example demonstration exercise  
Using metaphors

- ▶ Ask the learners in threes to discuss and agree on a metaphor that describes a union educator
- ▶ Ask the groups to share their metaphor and ask each other questions to unpack the metaphors
- ▶ Facilitate a plenary discussion by asking questions that assist people to explore their assumptions about the role of educators
- ▶ Ask learners if they would like to change their metaphor, and facilitate agreement on a collective metaphor

🕒 (20 minutes)

Third presentation on guidelines for the use of action methods

🕒 (10 minutes)

🕒 **TOTAL TIME: 30 minutes**

Key points and information	Plan and exercises
<p>This exercise gives learners the opportunity to create and write an action method.</p> <p>Divide people into four groups for the preparation.</p> <p>Join the four groups together into two groups to conduct the exercise.</p> <p>This exercise needs two educators, one to facilitate each group when they are conducting the exercises.</p>	<p>Third presentation on guidelines for the use of action methods</p> <p>🕒 (10 minutes)</p> <p>🕒 <b>TOTAL TIME: 30 minutes</b></p> <p>Writing an action method exercise</p> <p>Divide learners into groups of four.</p> <p>Give out the task sheet and explain the exercise.</p> <p>Ask the groups to keep to the timeframe of</p> <p>30 minutes preparation 15 minutes to conduct the exercise 15 minutes to review it</p> <p>Monitor the time and stop the exercise after 15 minutes.</p> <p>In the summary, ask probing questions to facilitate a discussion and analysis of the exercises.</p> <p>🕒 <b>TOTAL TIME: 60 minutes</b></p>



## SESSION FIVE

# Problem solving through role playing

 **3 Hours**



### Aim:

- ➔ To encourage educators to use role playing in problem-solving exercises

### Learning objectives: at the end of the session learners will be able to:

- ➔ Discuss the importance of problem-solving models and the type of union situations in which they can be used
- ➔ Write a role play task and scenario that requires learners to use a problem-solving model
- ➔ Introduce, monitor, debrief and review learning as part of a role play exercise

### Materials:

- Flip chart, board and markers
- Hand-outs Nos 11(a) and 16, and task sheet 2

### Prepare:

(1) a visual aid on the problem-solving model, Hand-out No. 16; (2) presentation with visual aid for Hand-out No. 16, pp. 3-5; (3) make a hand-out of the task sheet from Module One, Session 11; (4) make copies of task 2 for each learner.

**Key points and information**

*Give an example of how jumping to conclusions can cause problems.*

Summarize with a few points on the value for union representatives of learning to use problem-solving models.

*Hand out the task sheet for Module One, Session 11, as an example.*

Remind the *groups to select a simple single issue problem and a task that allows learners to practice the skills of solving problems.*

Give examples during the presentation.

**Plan and exercises****Brainstorming and discussion exercise**

- ▶ Show the visual aid and ask learners if they have used this model or similar models in courses for union representatives
  - ▶ Facilitate a brief discussion
  - ▶ Ask individuals to think of different types of union situations in which a problem-solving model could be applied (such as a dismissal case)
  - ▶ List the responses on the board
  - ▶ Facilitate a discussion to identify the types of union forums (e.g. meetings) where a problem-solving model can be used
  - ▶ List with the situations on the board
- 🕒 (20 minutes)

**Presentation on planning and writing a role play**

- ▶ Ask questions in plenary to identify other examples (20 minutes)

**Task 2: Planning and writing a role play (Step 1)**

- ▶ Divide learners into four groups
  - ▶ Give out the task sheet
  - ▶ Report back verbally to share exercises
- 🕒 (35 minutes)

**Presentation: Processing a role play**

🕒 (15 minutes)

🕒 **TOTAL TIME: 90 minutes**



**20 minute break**

### Key points and information

Join two groups together and explain that they will conduct the role play using the other group members as learners.

The two groups conduct the role plays at the same time, each with an educator observing and monitoring the groups.

Bring the groups together to review and discuss the role plays.

### Plan and exercises

Task 2: Planning and writing a role play (Step 2)  
**Use the same groups as for the previous exercise.**

Ask the groups to:

- ▶ Review the written task sheet and change or amend it
  - ▶ Organize themselves and prepare to conduct the role play
- 🕒 (20 minutes)

Each group has 20 minutes to introduce and conduct the role play, and ten minutes for debriefing and reviewing what has been learned.

🕒 (70 minutes)

#### Plenary review

Ask the learners how they felt conducting and participating in the role play.

Make a list of positive and negative aspects, and ask how the written tasks and the processing of the role plays could have been improved.

🕒 (20 minutes)

🕒 **TOTAL TIME: 110 minutes**



## SESSION SIX

### Course design

 4½ Hours



#### Aim:

- ➔ To assist educators to design courses using principles that support learner-centred approaches to education

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Select the right type of course for the general profile of a target group
- ➔ Select and organize content into a timetable that is logical and supports learning principles
- ➔ Design a timetable that is responsive to the educational needs of learners

#### Materials:

- ☒ Flip chart, board and markers, visual aids, coloured cards or post-it notes
- ☒ Hand-outs Nos 17, 8 and 6(a) and (b): task sheet 3

#### Prepare:

- (1) a presentation on the eight steps with a visual aid for each step, Hand-out No. 17;
- (2) write the short scenario on the board;
- (3) draw the eight-step model on a flip chart and place it at the front of the room.

## Key points and information

*The first session covers the principles and steps of course design, and the following two sessions provide the practice.*

During the session, use the scenario to design a sample course on the board, adding to it after each step has been explained.

### Short scenario

The union has asked the educator to conduct a course for 20 new shop stewards from factories in the electronics sector. These factories have not had union representatives before, and it is difficult to obtain paid leave for them to attend the course.

## Plan and exercises

Presentation on the eight steps, with plenary discussion

### Step 1: The target group

*Give the presentation for Step 1 of the model*

- ▶ Ask questions to develop a general target group profile
- ▶ Facilitate agreement on a general profile for the scenario and summarize it on the board

### Step 2: Select the type of course

*Give the presentation for Step 2 of the model*

- ▶ Ask learners the types of courses they have designed or conducted, and list them on the board
- ▶ Ask learners to select a type of course for the scenario, taking the profile into account
- ▶ When everyone is agreed, write it on the board

### Step 3: The aim and objectives

*Give the presentation for step 3 of the model*

- ▶ Give an example of an aim and ask the learners to suggest an aim for the course
- ▶ When people are agreed, write it on the board
- ▶ Ask learners in groups of three or four (not moving from their seats) to write two objectives for the course
- ▶ Ask the groups to share the objectives and agree on two for the sample course

**Key points and information**

Write on the flip chart or board the three headings: 'Essential', 'Useful' and 'Peripheral'.

Cover these steps and give examples for the course on the board.

**Plan and exercises****Step 4: Decide the content**

*Give the presentation for Step 4 of the model*

- ▶ Ask the learners to brainstorm all the possible topics that could be included in the sample course for their objectives
- ▶ Write them on the board
- ▶ Facilitate a discussion on which flip chart the topics should be placed with reference to the sample course design on the board
- ▶ Reach agreement on the lists

**Step 5: Designing the timetable**

*Give the presentation for Step 5 of the model*

- ▶ Ask people in their previous groups to design a timetable using the examples of the course designed during the session, and to write up the timetable on a flip chart
- ▶ Past the flip charts on the wall
- ▶ Facilitate a discussion to compare the timetables and principles

**Steps 6,7 and 8: Sessions, materials and administration**

*Give the presentation for these steps of the model and review different kinds of learning based on Hand-out No. 6(a) (KSAB).*

 **TOTAL TIME: 90 minutes**



**30 minute break**



### Key points and information

Give out task sheet 3

Divide learners into groups of no more than four or five, and explain that they will be working in these groups for the final practice task.

Monitor the groups to make sure they understand the task and have the necessary materials to produce it as a hand-out.

**If there is time after the presentations and review, give out task sheet 4 and suggest that the learners begin preparation.**

### Plan and exercises

#### Designing a course: Task sheet 3

Read through the task sheet and explain the time frames and process for reporting back.

#### Setting up the groups

In the plenary:

- ▶ Ask learners to brainstorm the different topics relevant for a shop stewards training course
- ▶ Write them on the board
- ▶ Ask learners to nominate their first preference, and write the names next to the selected course listed on the board
- ▶ Facilitate discussion until everyone is placed in a group (some people may have to go to their second preference)

Allocate time for the presentations, depending on the number of groups and leaving at least 60 minutes for review and feedback.

🕒 **TOTAL TIME: 90 minutes**



## SESSION SEVEN

### Evaluating a course

 1 ½ Hours



#### Aim:

- ➔ To ensure that educators evaluate all courses and provide reports to the union and to learners

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Describe what is evaluated during and at the end of the course
- ➔ Use different evaluation processes and exercises to suit the target group
- ➔ Design a process and questionnaire for each course for which they are responsible

#### Materials:

- Flip chart, board and markers
- Hand-out No. 18

#### Prepare:

A presentation with a visual aid from Hand-out No. 18, in two sections

**Key points and information**

Use plenary questions to reflect on the evaluation of the educator and resource persons

Write the task on the board.

**Ask the groups to add the evaluation process and questionnaire to the course design hand-out.**

**Plan and exercises**

**Sharing experiences**

- ▶ Facilitate buzz groups to find out what experience people have of evaluation and the different processes that they use
- ▶ Brainstorm the purpose of evaluation, make a list on the board and discuss
- ▶ Discuss the role of monitoring during the course

🕒 (15 minutes)

**Presentation on evaluation, first part**

- ▶ Ask the learners how they think an educator and other resource persons should be evaluated
- ▶ Facilitate a discussion on the benefits of peer and self-evaluation

**Presentation on evaluation, second part (designing a questionnaire)**

Ask learners what other methods they have used for evaluation.

🕒 (15 minutes)

**Designing an evaluation process exercise**

Learners work in their course design groups.

**Ask the groups to:**

- ▶ Design an evaluation process for the course
- ▶ Write a questionnaire to hand out at the end of the course
- ▶ Give a verbal report

🕒 (30 minutes)

Facilitate the groups to share and compare their responses, and discuss them.

🕒 (30 minutes)

🕒 **TOTAL TIME: 90 minutes**





# HAND-OUT 13(A)

## Adult education theory

### THIS HAND-OUT DISCUSSES:

- ▶ What is adult education?
- ▶ Types of adult education
- ▶ Its relevance to union education
- ▶ Discussion questions for small groups

*Theory provides a framework for analysing education practice and informs our choice of methodology and techniques*

HAND-OUTS

## ■ What is adult education?

Schooling is compulsory for children in most countries, at least at the primary and secondary levels. Primary, secondary and tertiary education, in countries where children have the right to education, has specific curricula and exams, and is certificated and regulated by State laws.

Teacher training is part of this system. Teachers need formal qualifications to be able to teach at a recognized education institution.

### *Adult education is different:*

- ★ It is usually **voluntary and often informal**, without State regulation or certification
- ★ **Adults have already accumulated a range of experience**, knowledge and skills, both informally and formally
- ★ **Adults learn because they are motivated** to do so and often have a specific reason to engage in education

Adult educators, who do not teach in the formal education system, often do not have access to training, and many university lecturers, for example, are not formally trained as educators.

In some countries, there are higher education courses for adult educators which provide a degree or certificate, but many adult educators learn informally or by working with other educators.

## Workplace training

This can be described as adult education, and is often a requirement of the job. It can be delivered at the workplace as part of an internal training programme, or workers can be sent to external institutions.

## Vocational training

This type of education offers accredited qualifications at different levels for specific trades (such as carpentry or cooking) or professions, and is sometimes referred to as technical training. It can also take the form of apprenticeships.

It is offered at tertiary or, in some countries, secondary level institutions, is covered by curriculum standards and examinations and delivered by accredited teachers.

Industry has a role in developing the curricula for vocational training and lobbies governments for the skills that are needed in the various sectors. Systems differ from country to country. Providers may also be from the private sector after applying for government accreditation.

Internships are increasingly popular, as the cost to the employer is minimal, but are difficult for young people if they cannot support themselves. Employers frequently use interns as a source of cheap labour without allowing them to gain relevant experience.

## Union accredited courses

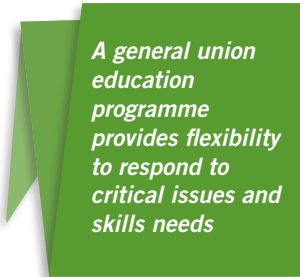
In some countries, courses to train union representatives are also part of the vocational training system, with unions submitting courses for accreditation and training people to be accredited providers. Such courses provide access to tertiary education for trade unionists with limited school education.

At the graduate and masters levels, the ILO Global Labour University is accessible to graduates from the trade union movement in Africa, Asia and the Pacific, Europe and Latin America, in cooperation with Fredric Ebert Stiftung and selected universities.

In some countries, accredited union training courses take precedence over general union education programmes.

However, there is an ongoing debate about the effectiveness of this approach because it uses more resources to educate fewer union activists. Moreover, as part of the formal education system, content and methodology are, to some extent, removed from the control of the union.

On the other hand, it can address the lack of education provided by the State for people who are denied access to education, and in so doing ensure that the programmes are delivered by certified providers.



*A general union education programme provides flexibility to respond to critical issues and skills needs*

## Types of adult education

Much has been written about the different types or traditions of adult education. This hand-out can only give a brief overview of the theories that are particularly relevant to union education.

The following summary is based on a hand-out prepared by Michael Newman for union educator courses at a TUTA union training college in Australia. Michael developed formal adult education curricula for the Faculty of Education of the University of Technology in Sydney and has written several books that have had an important impact on trade union and adult education around the world.

### Liberal adult education

Adult education was first developed in the United Kingdom in the early 20<sup>th</sup> century, when only the elite in society received an education. Education for working class adults was unheard of before then.

It was led by patriarchal and often patronizing philanthropists and scholars, but it opened up education for thousands of working men and women.

The teaching was at first conventional, but changed over time to encompass a more participatory approach. It took place in special institutes, was taken up by the university extension movement and resulted in the establishment of the Workers' Educational Association, which is still operating today.

Evening colleges were opened offering access to education after work. The concept of voluntary community adult education centres and external university classes spread to most English-speaking colonized countries.

It began the tradition of non-certificated/accredited vocational courses that are open to anyone, such as evening classes and week-end workshops offered by alternative institutions.

*Early trade union activists attended this type of education and courses were often developed especially for them*

### The mechanistic tradition

This type of education is based on a pragmatic 'how to' approach that informs vocational and industrial skills training and management training. It dominates the world of human resources management. It originated in the United States and grew from the development of industrial and commercial training practices.

The main focus of the 'mechanistic tradition' is on training people to achieve organizational goals. A trainer is asked to conduct needs assessments and skills audits, often accompanied by job and task analysis.

*Learners are called trainees and are treated as objects rather than subjects*

Management decides the programme and objectives are set to be met by trainees. Curriculum design models are used, including flow charts, with a step-by-step process for designing, implementing and evaluating training programmes.

Trainees are evaluated according to the levels of competency that they reach and outcomes are measured in terms of organizational profit and productivity. If trainees fail to reach agreed levels of competency, they are often demoted or dismissed.

## The psychotherapy tradition

This type of adult education began in the United States in the 1960s, when therapists began experimenting with a range of group work techniques and new styles of counselling.

The concept of the group facilitator emerged and was taken up by counsellors and educators concerned with personal or individual growth. It focused on helping people to recognize and achieve their potential, which was sometimes called 'self-actualization'.

Adult educators began providing workshops on 'personal growth', with 'experiential learning' becoming a popular phrase. It was used to describe techniques such as simulation, role play, games and other types of group work that drew on and examined life experiences.

This led to courses on communication and interpersonal skills, as well as other types of non-certificated courses in crafts, arts and languages.

Many adult educators used these methods responsibly and the tradition stimulated an increase of interest in adult education. It initiated new and exciting teaching and learning techniques, and a substantial body of writings on adult education grew out of it.

*If there are no objectives, this type of adult education can become self-indulgent, directionless and is sometimes used by manipulative facilitators to make money*

## Community development and radical education

This tradition is primarily concerned with developing the experience of groups or social classes, and offers education for people on their own terms. It is used to improve understanding of the social, economic and political conditions in which people live, encouraging them to take more control over their lives.

This type of education aims to empower people by strengthening their sense of community and common purpose. It is political because it is concerned with injustice and inequality.

For example, from the early 1900s, a radical form of education was developed in the south of the United States to address poverty, racism and disempowerment by strengthening community feeling and action.

This resulted in strong support networks and independent organizations that joined with trade unions and civil rights groups. Individuals and groups were empowered through education to take direct action against the government, employers and rampant racism.

*The experience of learners forms the curriculum, the analysis of their experience informs the learning, and planning for action forms future learning*



**The radical approach** to adult education gives it an activist and political role. It brings people together to share violations and stories of exploitation and, in this environment, people learn about the causes of injustice and plan collective action to stop it happening.

**In community development education**, groups are defined by communities, culture, interests or localities, rather than economic or class oppression. In this context, it has de-politicized education in aid and development projects, which continue to be based on the colonial ideology of knowing what is best for people. Aid and development principles are rarely class based, and are often disempowering.

## Relevance to union education

Union education is neither ‘pure’ adult education, nor is it psychotherapy or management training.

- ✳ Management training is hierarchical and one-sided because organizational needs take precedence over individual needs
- ✳ Pure adult education and psychotherapy are directed at the individual learner
- ✳ In radical and popular education traditions, educators direct learning at both the individual and the collective group

*Union or labour education takes ideas and methods from the different types of adult education, but forms its own unique category*

In the types of education described above, there are only two parties involved, management and workers, or teachers and participants. Union education differs because there are three parties involved

## The third party in union education

The three parties consist of: (1) the union; (2) the union educator; and (3) the learners, who are usually union members or representatives.

- ✳ **The union as an organization dominates the programme planning process** because it is accountable to its members and education activities have to meet the union’s needs and comply with its policy
- ✳ **The educator is accountable to the union** for the delivery of the programme as part of union policy, **and to the learners** as union members for the quality of the education
- ✳ **Learners as activist union members or elected representatives** expect the programme to be related to union policy, their roles in the union and issues of representation. They also expect the educator to respect them and to act in a democratic and inclusive manner.

*With a view to factoring in the third party, union education selects different components from each of the traditions discussed above:*

- ★ **The education programme is funded from union dues** or by external donors so, as objectives are needed for purposes of accountability, methods from the mechanistic tradition are used
- ★ **Union representatives need identified skills and knowledge** to represent members, so training courses have to be designed to deliver them, adopting methods from the mechanistic and psychotherapy traditions
- ★ **Unions struggle for rights, social justice and decent work**, and therefore need activists who can participate collectively in the union at a political level. Educators need to use methods from radical or popular education to involve and empower members to take action.

## Discussion questions for small groups

The following exercises can be used for small group discussions in the union or a workshop to explore in greater depth the topics covered in the hand-out, and they illustrate the use of questions to stimulate debate.

*What type of influence should employers have on government tertiary education policies or vocational training?*

**Consider the following statements:**

*'Industry lobbies governments to ensure that formal education curricula teach the workplace skills they need to meet the needs of capitalism.'*

*'The formal education system marginalizes courses and degrees based on creative and political subjects, such as music, art or political sciences and literature, and prevents young people from becoming activists.'*

**What impact does this have on society and the opportunity for young people to think about alternatives to working in industry?**

***When should unions accept funds from an international donor?***

**Consider the following statements:**

*'The donor organizations dictate the issues that can be taken up in a project, even though they are not relevant to the union.'*

*'Using donor funds can be time-consuming and detract from the day-to-day work of unions.'*

**Is it more important to have the funds to implement activities and capacity building and, if so, what terms should the union negotiate with the donor?**

***Have unions been influenced by the impact of neo-liberal capitalism in the move away from general union education programmes?***

**Consider the following statements:**

*'Unions take funds away from education because of the trend towards campaigning and do not see the need to educate people to plan and implement campaigns.'*

*'Union leaders are influenced by the statement "union education is carried out just for the sake of education," and reduce resources for programmes.'*

**How valid do you think these statements are and why do you think unions should factor education into campaigns and recruitment strategies?**





# HAND-OUT 13(B)

## Learning to learn

### THIS HAND-OUT DISCUSSES:

- ▶ Influences on union education
- ▶ Adapting and selecting course methods
- ▶ Human rights education (HRE)
- ▶ Examples of adult educators

### Influences on union education

There have been many influences on union education. This hand-out focuses on two people who have had a profound impact on the way in which learning can strengthen trade unions and union activism. Both have similarities, but different perspectives and experiences.

### Myles Horton

Horton was born in 1905. His parents were teachers in a poor area in the south of the United States. He grew up with poverty and felt its impact on people's lives. His parents encouraged him to learn and, after his formal education, he started teaching but continued to explore, through travel and further education, ways of teaching that have a direct meaning on people's lives.

*Horton believed that answers to poverty and oppression must come from the people who experience it*

He found teachers and mentors in the United States and Denmark who led him to the belief that education should play a major role in bringing about social change by empowering people to make choices about their lives.

Through his initial teaching experiences, he learned about the exploitation of workers by studying and observing trade unionism in real life. He learned how workers organize and carry out action collectively.

He founded the Highlander Folk School, a radical institution which became famous for developing activists in various movements, including trade unions, civil rights and the environment.

Horton did not write down his work. He was more of an activist than a writer. But his beliefs and approaches were recorded by those who worked with him or interviewed him.

He brought trade unionists and workers together to solve real problems, provided them with the information that they needed, such as laws, and gave them the space to work on their own solutions.

He joined them in actions and experienced ugly and violent disputes and strikes because he wanted first-hand knowledge of the issues that were being raised in the workshops.

He used real situations in exercises and discussions and knew that, if social change were to be possible, he would have to teach within and from the experiences of workers.

Horton realized early on that an educator cannot be politically neutral and saw education as an extension of politics. He was clear about his position on justice and equity, democracy and poverty, but did not preach to people. Instead, he shared his vision and let them come to their own understanding through analysis and debate.

He set examples of democracy, equality, justice, respect and collectivism in the way that he taught people. He wanted to give learners the opportunity through a course to experience what a new society could be like.

Learning to avoid being an expert or authority was an important step in the development of his approach to education, because he knew that it takes away people's ability to solve their own problems. He always started by listening to people's experiences, using questions so that learners could examine their own beliefs and how they saw society. Using this approach strengthened people's confidence to challenge employers and the society in which they lived and worked.

He believed that to bring about radical change people need to understand the context in which they live and work, **and that they have a right to have access to information. He believed that it is the educator's responsibility to supply this so that it can inform how they make decisions.**

Horton, known as the 'radical hillbilly', passed away in 1990 at the age of 85. The Highlander Folk School is continuing the education and work that he began so many years ago.

*The most important thing people learned at Highlander was how they could help themselves*

### ***Applying the approach***

*Example: workers at a non-unionized clothing factory are threatening to strike because the employers have dismissed some workers and are bringing in a payment by results scheme that will reduce pay for all the workers. They have asked the local union to assist them.*

**The union invites the workers to attend an evening workshop to discuss the situation. They set up a crèche for the women's children in the next room.**

- ✳ In the workshop, the educator and the union leaders ask the workers questions related to the dispute, the situation at the workplace and in their communities, and how they are trying to resolve it.
- ✳ They listen to the responses and realize that there are gaps in the workers' understanding of the structure of the company and the legal situation.
- ✳ They invite the workers to attend a second workshop for further discussion, and the workers agree.

- ✱ At the workshop, they provide the workers with information about the law and their rights. They encourage them to discuss their strike strategy in groups and to decide how the information might change their plans.
- ✱ The groups report back to the plenary and the educator facilitates a dialogue between the members and the leaders, and the workers reach an agreement on how to proceed.
- ✱ The leaders and the educator join the strike, which is partially successful. The union sets up another workshop to analyse the outcome and decide any future action.

**Result: the members of the union are involved in the strike strategy from an informed position and all workers support the strike.**

- ☒ The management agrees to re-employ the sacked workers, but still insists on a new pay system.
- ☒ The workers analyse the strategy and, based on what they have learnt, can decide on future action to campaign against the new pay system.
- ☒ The workers join the union and the workforce of mainly women feel that they are in control of the situation. They see the union as an ally, not another boss.

## Paulo Freire

Freire was born in Brazil in 1921. During the great depression of the 1930s, he experienced poverty and hunger and came to understand how difficult it is to learn in such circumstances. He studied law and philosophy at university, but did not practice as a lawyer. He worked as a teacher.

This work again brought him into direct contact with poverty. On taking up a position as director of cultural extension services, he began to implement literacy campaigns for people who could not read or write, which later led to his imprisonment and exile in the United States. The methods he used were successful, as he once taught 300 illiterate sugar cane workers to read and write in 45 days.

*Love, faith, hope, humility and trust are the necessary ingredients of dialogue*

In exile, he began writing books and extended his experience by working with governments on education policies in Portuguese-speaking African countries, and later as a consultant for the World Council of Churches in Geneva. When the regime changed, he returned to Brazil in 1980, became a professor of education at two influential universities and continued his writings on transformative education.

He was part of a radical movement called '*Ação Popular*' established in the 1960s based on the belief that human struggle plays a significant part in history, but can only be effective when individuals are given the opportunity to develop their potential by critically analysing the world around them.

Freire was concerned to create a better world and believed that oppressive regimes prevent people from making decisions about their lives. He was influenced by Christian activism and Marxism, and the impact of colonization. He saw education as liberating and revolutionary because he believed that the people have the ability to create a better society, and that education outside the formal system cannot therefore be politically neutral.

He underpinned his work with the concept of 'Praxis', which aims to turn knowledge into action. This goes further than action based on reflection, because it is action that is formed by a commitment to human well-being, justice and respect for others.

He organized literacy campaigns for slum dwellers and the rural poor which started with culture circles and used pictures to challenge students to think critically about their lives so that they could take control of their own destinies.

These became literacy classes that empowered people through reading and writing skills so they could vote and participate in political processes. He realized that oppression and poverty deny people access to knowledge and information, thereby preventing them from becoming critically aware of their reality and their role as potential agents of change.

He adopted a 'problem-posing' method, contrasting it to the 'banking' concept of formal education, in which people are seen as objects or 'empty vessels' to be filled by the teacher. The problem-posing concept sees them as subjects who can reinvent and recreate their world.

Many have written about Freire and analysed his work. Some feared his approach because it appeared too threatening, while others praised it and many have adopted it in various ways in their teaching and learning methods. He was still writing books when he passed away at the age of 76.

*Freire believed that people must 'name their own world' in order to change it, and not accept someone else naming it for them*

### ***Applying the approach***

Example: complaints of racial harassment have been increasing at a few workplaces, and it has been found that members are involved as perpetrators and victims. The union decides to conduct a series of workshops for members on the issue.

**The educator realizes it is a sensitive issue and that asking people to share their own experiences can create tensions, and therefore decides to use a problem-posing exercise.**

#### ***The educator:***

- ★ Presents the learners with a workplace story that is similar to the type of harassment being experienced, with questions for discussion



- \* In groups, the learners discuss the story and use their own or others' experiences to describe how they feel about the story, define the problem, share similar experiences, discuss the cause of the problem and find solutions to the problems raised
- \* The reporting back by the group offers the opportunity for further discussion, and the educator facilitates a joint understanding

**Results: on returning to the workplace, the members and representatives, with the support of the union, decide to negotiate a racial harassment policy with management, who agree that the shop stewards can conduct workshops to raise awareness of the issue among workers.**

## Popular or radical education

The work of Horton and Freire has influenced many adult educators working in different contexts all over the world. They work in universities, language teaching, community development, unions or non-profit justice or peace organizations. Their adaptation approach and the philosophy of Horton and Freire are known as 'Popular Education' or 'Transformative Education'.

This category of adult education is class based and recognizes the political struggle for social transformation, the fair distribution of wealth, justice and genuine democracy. It is based on establishing a democratic environment for learners, mutual respect between educators and learners, a shared critical reflection on society and collaboration in action to change the course of history.

*The teacher does not impose authority, but poses questions through dialogue so that there is an equal relationship with the learners, and the educator also becomes a learner*

## Adapting and selecting education methods

As seen in the previous hand-out, and again in this hand-out, there are different approaches to adult education. Union education programmes tend to use a combination of these approaches.

### ***To do this, educators need to think about:***

The rationale for selecting an education method

- \* How to use learning objectives that are written before a course and still maintain a flexible and democratic approach to learners' needs
- \* How to remain accountable to union policy, while at the same time empowering members and representatives to be activists and take control of their lives

*Being participatory and accountable at the same time are not mutually exclusive: they can be achieved together*

**Educators need to know:****Who the learners are?**

- ✦ For example, they may be shop stewards, health and safety representatives or women's leaders. Educators can work with the union to develop a profile for the different tasks and responsibilities needed to represent workers and members. They can also learn about the different workplaces and sectors that the union is responsible for organizing.

**Why the course or workshop is needed?**

- ✦ Is it part of a general skills programme for shop stewards, or is it on a specific issue that reflects current issues or union policy. The course objectives are then written around the answers to these questions, demonstrating accountability to the union.

**What content is needed and what type of method is suitable for the objectives?**

- ✦ The educator then prepares a course, session outlines and materials based on the target group and the objectives. If it is a skills course, instruction and practice will predominate. If it is an attitudinal issue, such as gender equality, then there will need to be exercises and tasks that allow discussion. These should be in accordance with union policy.

**How does the educator demonstrate accountability to the learners?**

- ✦ This happens during the course itself. The educator establishes an environment of trust and respect, finds out expectations, is prepared to discuss the objectives and content of the course and, if necessary, make changes, or explain why it is not possible to do so.
- ✦ Sessions start with people's experience and move into discussion and problem solving, with exercises that are real and relevant to the workplace. There is no preaching or authoritative direction, and learners have control of their learning.

**Human rights education (HRE)**

Non-governmental organizations (NGOs) have also developed a body of knowledge and successfully campaigned to have HRE internationally recognized as an integral part of education at all levels. Amnesty International plays a major role in this respect, in cooperation with other NGOs and the on-line network Human Rights Education Associates (HREA).

*Trade union rights are part of human rights*

*Unions can play a role in ensuring the implementation of the United Nations Declaration on Human Rights Education and Training (2011)*

In 2011, the United Nations Human Rights Council adopted the Declaration on Human Rights Education and Training, which was then endorsed by the United Nations General Assembly without a vote. It is not legally binding, but affirms the international commitment to ensuring that **people, including workers, know about their fundamental rights and the rights of others.**

It calls on countries “to strengthen all efforts in human rights education and training through a collective commitment by all stakeholders”, **including trade unions.**

It affirms the “importance of human rights education and training in contributing to the promotion, protection and effective realization of all human rights”, including those that struggle for them, **such as trade union activists.**

The Declaration has 14 Articles covering a range of practical education activities and recommends States to establish action plans and programmes in school curricula and for State officials, civil servants, judges, law enforcement officers and military personnel. It also promotes the inclusion of human rights in training for teachers and other educators.

## Examples of adult and union educators

### Examples of adult educators on whom union educators can draw:

- ✱ **Michael Newman**, who worked directly with the trade union movement in Australia and around the world, developing courses that challenged educators to adopt these approaches, writing books that inspire and motivate, and opening up adult education qualifications for union educators.
- ✱ **Jane Vella**, who developed a structured set of principles and practices for translating theory into action and results, calling it ‘Dialogue education’. She has written many practical books and developed ‘The seven steps of design’ to guide course planning.
- ✱ **Nina Wallerstein**, a Professor at the University of New Mexico, developed an approach to problem-posing education based on Freire’s methods for transformation, using it in teaching language and health, including courses on occupational health and safety.
- ✱ **Bev Bourke, Jojo Geronimo, D’Arcy Martin, Barb Thomas and Carol Wall**, who wrote ‘Education for changing unions’ after years of delivering union education programmes for the Canadian Labour Movement. Their work links education to six threads: ‘community, democracy, equity, class-consciousness, organization building and the greater good’. Planning is linked to a spiral model that shows how the educator can take learners from their experiences to applying what has been learned in the world. The book is full of stories and interesting exercises.

*Search for these names and learn more about them*





## HAND-OUT 14

### Using questions in discussion

- ▶ This hand-out follows on from Hand-out No. 7(c) in Module One and looks in more detail at the use of probing questions.

The type of question an educator asks has a direct result on the depth and value of a discussion.

Questions draw out people's experience, but can also assist learners to think more deeply and analyse issues and problems.

This is especially important in exercises that challenge people's attitudes and behaviour, because it gives them the opportunity to make informed decisions for the future.

*Carefully planned questions are the key to participation and learning*

### ■ Probing questions

*(The use of closed and open questions, information questions, leading questions and rhetorical question is covered in Hand-out No. 7(c))*

This hand-out focuses on probing questions because they are the most important for creating discussion.

They encourage people to become involved in meaningful dialogue and look critically at issues or situations.

Asking probing questions is an important skill for a union educator or facilitator. Practice is required to be able to consciously select the type of questions that can stimulate dialogue.

***Probing questions can be divided into the following situations:***



#### Questions that seek evidence

##### When to ask the question

If a person states an opinion that seems out of context, or appears to be unjustified or unsupported.

##### Examples:

*'That could be important; how do you know about it?'*

*'An interesting comment; what information have you based it on?'*

### ? Questions that seek clarification

#### When to ask the question

To give learners a chance to expand on an idea in order to improve the understanding of others.

#### Examples:

*'It would be good to explore this further; can you put it in another way?'*

*'To help us understand it better, do you have an example to describe it?'*

### ? Questions to think critically

#### When to ask the question

To give people the opportunity to analyse a situation.

To explore assumptions, values, relationships, alternative ways of thinking and acting that help people make choices and decisions.

#### How to ask the question

*'What type of person could be taken advantage of in this situation?'*

*'Can you describe the impact this would have on that group of people?'*

*'How could you describe the values behind this point of view?'*

*'How could you do that differently?'*

### ? Questions to explore feelings

#### When to ask the question

To establish the emotion behind a response or statement in order to assist people to explore their own feelings.

#### Examples:

*'How do you feel when someone says something like that to you?'*

*'What feelings did you experience when you saw that happen?'*

### ? Questions to link or extend issues

#### When to ask the question

To engage learners in developing issues together and exploring options.

#### Examples:

*'In what way does that contribute to the discussion?'*

*'Can you explain how that supports what has already been said?'*

*'How do think that would be viewed by others in that situation?'*

**? Questions to explore action or change**

**When to ask the question**

To examine what might take place in different circumstances or to focus learners on outcomes and actions.

**Examples:**

*'How can you relate this to a situation at your workplace (or in your union)?'*

*'In what way could this influence the campaign you are implementing now?'*

*'Can you think of another way of taking the strike forward?'*

*'If you were the worker, how would you react to such a situation?'*

**? Questions to summarize**

**When to ask the question**

To help learners bring things together, deal with unresolved issues or recall issues and situations that have been raised previously.

**Examples:**

*'What else should we remember when dealing with this situation?'*

*'Would anyone like to raise issues that may not be resolved yet?'*

*'Who can think of a key word or concept that describes the discussions in the session?'*

**Remember**

- ➔ If people have difficulty with a question, rephrase it or break it into smaller components
- ➔ Give people time to think about a response
- ➔ Ask yourself 'What do I want the question to achieve?'
- ➔ Write questions for exercises that are clear and only contain one point or issue
- ➔ Test questions on someone before using them in an exercise

*All questions must have more than one possible answer*







## HAND-OUT 15

### Using action method exercises

#### THIS HAND-OUT DISCUSSES:

- ▶ Discussion as dialogue
- ▶ Different types of exercises
- ▶ Guidelines for using action method exercises

Action method exercises assist educators to use the theories discussed in Hand-outs Nos 13(a) and (b) because they integrate the processes of sharing, reflection, critical analysis, problem solving and taking action.

#### *Action method exercises:*

- ★ **Explore and analyse theories, problems, issues and values**, and encourage the process of dialogue and critical thinking
- ★ **Give learners more control** over their learning outcomes because they treat people as thinking humans rather than receptacles for knowledge
- ★ **Focus people on a topic, build trust and collectivism**. They can also let educators know how people are feeling and progressing.

#### Discussion as dialogue

Today the terms 'discussion' and 'dialogue' are used interchangeably, without much thought for the actual meaning or processes involved. The definitions are similar, but dialogue describes a deeper and more democratic process.

**'Discussion'** can be defined as an action or process of talking about something in order to reach a decision or exchange ideas.

- ★ Genuine discussion involves people listening to each other and respecting different points of view in order to exchange ideas and find a solution.
- ★ People lead busy lives and are always in a hurry, leaving no time for genuine discussion. The word may also be used to make a good impression, with no intention of fulfilling its actual meaning.

*Dialogue and discussion need an environment of trust and respect which is non-judgmental*

A supervisor may call workers to 'discuss their performance'. This usually means that the workers will be told something. The supervisor will be watching the time and will not provide much opportunity for the workers to respond, and has probably decided the outcome of the 'discussion' before the meeting takes place.

People often leave a meeting or discussion group feeling frustrated because there are no new ideas and nothing has moved forward. The discussion has just been a process where people took turns to repeat what others have said or already know.

The habit of repeating what someone else has said without understanding where it has come from or why it was said prevents meaningful discussion from taking place.

**'Dialogue'** can be defined as an exchange between people who are taking part in a conversation to solve a problem.

- ★ Popular education extends the definition further to include the process of sharing, reflecting, critically analysing and problem solving, so that agreed action takes place
- ★ Dialogue requires a degree of honesty from speakers to acknowledge where an idea came from if it is not their own

If people do not acknowledge this, they are not speaking with truth or sincerity. They are speaking from hearsay, and often cannot substantiate what they have said. They may not even have the authority or legitimacy to say it.

Respecting different opinions, even if a person does not agree with them, helps to keep an open mind. New ideas can emerge from dialogue only if people are prepared to explore, rather than reject differences.

In union education, the term 'discussion' is used in materials, tasks and exercises in place of dialogue. Whichever word is used, educators need to make sure that it is used in the popular education context, with sufficient time allocated to follow the process through to a satisfactory conclusion.

## Different types of exercises

### Spectograms

These exercises are used at the beginning of a session or to introduce a new topic. They assist people to share experiences and provide a basis for taking the issue further in discussion groups.

Learners move from their seats and mix with others around the training room, forming lines, triangles or diagrams that represent an issue through time spans, categories or geographical locations.

*People should always speak about what they believe is true and be able to justify it*

*Some exercises have standard names, but they can be mixed up, added to or expanded*

*The only limitation is the educator's creativity*

The educator or the learners set time frames or categories. The learners then move around and question each other to find a place on the line or diagram that relates to their experience.

They then pair up or form groups to discuss the questions posed by the educator. The questions must be open and able to stimulate discussion about the issue.

### **A geographical spectogram used as an ice-breaker**

***The purpose is to provide an opportunity for learners to show where they come from and their journey in getting to the course.***

#### **The educator:**

- ★ Finds a large space and asks learners to imagine a map of the area or region and locate their point of origin on the map
- ★ Instructs them to ask each other questions and form the map by standing where they came from
- ★ Each person takes it in turn to walk to the location of the course and describe where they came from and their journey, whether they had an adventure or any problems. Other learners are encouraged to ask questions

*The educator sets flexible time limits for each part of the exercise and then judges by the level of activity if it is time to move to the next step*

**The learners get to know each other better and the educator can resolve any problems that are raised.**

### ***A line or diagram spectogram can be used as an ice-breaker or a warm up activity to introduce a topic***

#### **The educator:**

- ★ Creates an empty space and draws an imaginary time line in years or months
- ★ Asks learners a question (**‘How long have you been a union educator or a shop steward?’**) and writes it on the board
- ★ Asks people to find a place on the line by talking with others
- ★ When everyone has found a place on the line, asks them to discuss something to do with the question (**‘One thing you like and one you don’t like about being a shop steward’**) either with the person next to them or at the other end of the line, and allows a few minutes for discussion
- ★ Asks for volunteers to share what they talked about with the plenary, using probing questions to assist them

***To create a second level of discussion:***

- ✦ Identifies an imaginary triangle and gives each line a category, such as wage negotiations, recruitment and grievance handling
- ✦ Asks learners to place themselves on the line to demonstrate where they work most
- ✦ Asks the people on each line to discuss their work together for a few minutes
- ✦ Brings people together and finishes by asking people to place themselves in the category that they like the best and to discuss why they put themselves there

**This allows learners to share stories about the type of work they do, what they think of it and what they like or dislike about it. The exercise can be extended into small group work to discuss how they could improve ways of representing members.**


## Metaphors

A metaphor is a word or phrase that can be used to describe, for example, a perception of an issue, an organization or a role, using a suggestive likeness.

Learners can explore creatively how they see an issue or themselves by linking it with something concrete.

Using metaphors assists learners to think more broadly and to confront or explain feelings or ideas through association with something else.

A metaphor can carry several layers of meaning, which can be unpacked in discussion and give insight into an emotion, object or issue. It is a useful way of allowing people to analyse their feelings about something.



*The wage negotiations were like a boxing match*

***Metaphor exercises can be used:***

- ✦ As a short exercise to start a plenary discussion
- ✦ As a longer exercise with several steps that gives learners the opportunity to adjust or change their original metaphor or perception of a situation. Learning takes place when the original metaphor is seen in a different perspective and then revised.

***Example: in a session exploring the role of a shop steward***

**The educator describes what a metaphor is and then:**

- ✱ Asks individuals to write down a metaphor that describes themselves as a shop steward, and gives an unrelated example such as ‘a union office is a safe harbour away from the storm’
- ✱ Invites learners to work in buzz groups of three to share their metaphors by asking each other questions about them (unpacking the metaphors)
- ✱ Asks people to share their metaphors in plenary
- ✱ Assists people to explore their assumptions and values about the role of shop steward through questioning and facilitation
- ✱ Asks learners to go back to their groups and discuss their metaphors in more detail, factoring in the issues raised in the plenary
- ✱ Asks individuals, in silence, to review their original metaphor and change or revise it if they want to share the new or revised metaphor with their group
- ✱ In plenary, asks who changed their metaphor and invites them to explain why
- ✱ Asks people to share what they learnt from the exercise

**Shop stewards have the opportunity to share and analyse how they feel about their role and the values that underpin it. Listening to other people’s assumptions and values can help them to see the role differently and be able to change the way they do things.**

## Sculpturing or miming

This method assists learners to represent an idea, attitude or existing situation without using words. The process of finding how to represent the issue means that people move from an ‘intellectual’ to a ‘doing and feeling level’.

Learners use body language or postures to illustrate something in a fixed posture (sculpture) or movement (mime), either individually or in small groups.

At the same time, the exercise builds confidence and collectivism, and it energizes learners because it varies the pace of a session.

*Actions are a universal language and have more impact than the spoken word*

## EXAMPLE

**In a session examining the stereotyping of women in society**

The educator

Describes sculptures and miming and introduces the steps of the exercise, explaining what learners are expected to do, and making sure that everyone understands the process

**Then**

- ▶ Divides learners into groups of three and asks each group to give themselves a name and write the name on the board
- ▶ Asks the groups to think of one object generally associated with women and one object associated with men and to decide how to represent these objects through either a mime or a sculpture
- ▶ Asks all the groups to stand together in a circle and walk around
- ▶ After a few seconds, calls out 'freeze' and asks a group to represent their objects until all the groups have shared their mime or sculpture
- ▶ Asks people to guess what the group was representing and lists the responses on the board
- ▶ Asks people to sit in a circle and facilitates a discussion on why they chose the object, what it illustrates in terms of gender stereotyping, why it happens and what impact it has on women and men
- ▶ Asks people to return to their groups and discuss the prevalence of gender stereotyping, how it can be reduced and what role they can play in their union to prevent it from happening
- ▶ Asks the groups to report back their responses and facilitates a discussion to summarize the outcomes of the session.

**Alternatively**, if there is equal representation of men and women, the learners can be divided into two groups of the same gender. The men's group can be asked to represent a woman's space in society and the women's group a male space (where they can be found), followed by group or plenary discussion.

**The exercise provides the opportunity for learners to recognize that stereotyping is an everyday occurrence, to explore the negative impact it has on women and society and what the union can do about it.**

## Time lines

Provide a visual picture of a series of events or activities over a period of time.

*They can be used to:*

- \* **Examine an event or organization** over a number of years or months, such as a union organization or a series of events that led to an economic crisis.

*Putting something into an historical context helps to analyse the present*

**Plan activities** for a campaign or a **development project**. After the activities have been decided upon, learners can write them onto colour-coded cards and place them along the line, identifying whether they are logical or in the right place. The line represents a visual picture of the plan and the cards can easily be moved around until people are satisfied.

The process allows learners to visualize progress or identify setbacks, and to analyse different parts of the time line, thereby testing understanding or perspectives of the different events or actions.

EXAMPLE

**In a session of a course for new shop stewards that looks at the history of the union**

***The educator***

Puts up a row of flip chart papers on the wall, with space for learners to move around, and draws a line horizontally across them with the year that the union was formed at one end and the current year at the other, and places post-it notes and marker pens on a table nearby.

***Then***

- Asks learners to get up and stand around the flip chart papers
- Explains that the line represents the years that the union has existed, with people's personal issues above the line and union issues below it
- Asks people to think of a personal experience in the union, write it on a post-it note and place it above the line approximately when it happened
- Asks people, in plenary, to share their experience of what was happening in the union or the labour movement at that time and to write each event on a post-it note and place it below the line at the time that it happened
- Facilitates discussions about each event and links them to the history of the union, such as a campaign, wage bargaining, a change of government, new policies or leadership
- Each issue or event is discussed in more detail with questions such as: What impact did this have on the union? What were the results? Why did it happen?
- As the discussion develops, marker pens can be used to illustrate periods of change

**The history of the union becomes a visual picture that is related to the experience of learners of what they were doing at that particular time. It can also be referred to in other sessions, such as those on wage bargaining or the economy.**

## Guidelines for using action methods

Action methods allow people to experience a variety of learning styles in one exercise. They provide the opportunity to work collectively in small groups and in plenary, to explore and analyse issues that lead to some form of action.

This type of exercise can cause tensions, because it may directly challenge learners' assumptions and values.

*Learners need to leave feeling positive and with a sense of progress*

## General principles for avoiding tensions

- ★ **Exercises need to be planned into a session** so that they assist in meeting the learning objectives, following the principle of shorter and simpler exercises leading to more complex ones
- ★ **Leave sufficient time** to finish the exercise in the time allocated. It is frustrating for learners if discussion is rushed, or steps missed out.

Sometimes it is difficult to prevent discussion going on for longer than planned, but new time frames can be negotiated with the learners. The educator can see if the discussion is important to the learners and the outcome of the course, and shorten the break or the next session.

- ★ **Explain the purpose of the exercise, the method and the process.** Let the learners know what they are expected to do and how to do it. People cannot focus on the tasks or a question if they are wondering what is going to happen next.
- ★ **Think about how learners may feel about participating in the exercise.** It is important to challenge learners and to ensure that the exercise is not boring or shallow. Check whether it may be threatening, too difficult or raise issues that are sensitive in the type of discussion that is being used.
- ★ **Always finish the exercise by asking people how they felt** about doing it and what they learnt. End up by summarizing learners' responses. If there are tensions, deal with them before people go into a break or the next session.

*Always design the exercise with time for dialogue and meaningful discussion*





## HAND-OUT 16

### Problem solving with role play

#### THIS HAND-OUT DISCUSSES:

- ▶ Using a problem-solving model
- ▶ Situations for role plays
- ▶ Planning and writing a role play
- ▶ The processes for conducting role plays

*A model helps representatives and unions make choices that do not create more difficulties for members*

HAND-OUTS

This is a continuation of Hand-out No. 11(a) and focuses on using pre-planned role plays. This type of role play needs at least two sessions to ensure sufficient practice for learning to take place.

#### Using a problem-solving model

Most union work involves solving problems and making decisions, at the workplace, for legal representation, challenging government and employer policies or dealing with internal union issues.

The fundamental role of a union is to represent others, and it is important for elected and appointed officers at all levels to have the skills and knowledge to do this efficiently and effectively.

#### The following model:

- \* Ensures that the decision-making process is accountable
- \* Prevents solutions being imposed on unions
- \* Can be used for single or multiple issues in a variety of forums, such as meetings or negotiations
- \* Can also be used by individuals to tackle personal problems at the workplace or in the community
- \* Is useful for planning campaigns or policy directions

Exercises and role plays can encourage the use of the model in everyday work, and learners can put it into practice in their union roles.

### Problem-solving model

**What's wrong?**  
*Define the problem*

**What can we do?**  
*Explore what to do*

**What will we do?**  
*Make decisions*

FACTS AND ISSUES



OPTIONS



ACTION

## Using the model in a role play

The model is introduced and discussed before the role play, so that the groups can apply it to the exercise.

During the debriefing, feedback and review, the educator asks probing questions to deepen learning.

### Examples of questions to ask

- ★ Did you consider the **interests and positions** of the various parties to the problem, and how would you describe them?
- ★ What was the **meaning behind the facts?** Did they lead to other problems caused by management, or were company policies not being applied?
- ★ How did you ensure that the member/s understood the **importance of getting the facts correct?**
- ★ Which of the issues did you think were the most important? **Do you think you solved the right problem, and how were other problems connected?**
- ★ **How did you factor in all possible options**, however extreme? Did you consider doing nothing as an option?
- ★ **What was the impact of the various options on the member or members concerned?**
- ★ **How did you decide on the option selected?** What factors were taken into account? How did you know it was in the best interests of the member or members concerned?

*Asking questions deepens analysis*

*Learners arrive at their own conclusions about what does or does not work*

## Planning and writing a role play

The role play needs to be integrated into a session in the following order.

Plenary information and discussion to introduce a theory and/or give instructions for a skill



An introduction to the role play, with a task sheet handed to all learners



Time for the groups to prepare



Conducting the role play



Time to debrief and give feedback and review

*Role plays can be conducted with many different variations of problems and backgrounds, but the same process applies*

***All the learners are involved in a pre-planned role play, so a clearly written task sheet is essential.***

***The problem*** should be easily understood, but complex enough to provide different options, and it should be related to the topic of the session.

*The problem must be challenging, not confusing*

Example: in session on negotiating an individual grievance, the role play must provide practice in negotiating and the problem must be realistic, with two or three possible solutions or causes.

**The background** contains a set number of characters who are given a name and a designated role. The characters' attitudes can also be described.

In the above situation, there could be two management people, two union representatives and the member with the grievance.

The learners are divided into two groups (management and union). Each group works collectively on the task and selects people in their group to play the nominated roles.

*The task sheet must explain what the observers should look for*

### Who plays the management?

- ✦ If the learners have no experience of negotiations, or it is a complex role play with many characters, the educators or other union officials can play the management role.
- ✦ If the management role is played by the educator, the learners can be divided into groups, with each group given a different problem situation. If there are three groups, then there will be three separate role plays.

### Role plays for training union (para-)legal officers

- ✦ The problem is acted out in a mock courtroom situation, with the groups preparing to put a case to a judge or commissioner, who is played by union officials or legal officers.
- ✦ The previous sessions provide information on the law, the legal process and how to prepare and present a case in court. The problem situation can come from real legal cases in the sector that the learners represent.

### Other situations for a role play

- ➔ A union committee meeting, where representatives have to work on a problem and decide a strategy or plan a campaign.
- ➔ A workplace union meeting, where the observers play the union members. The members are given different points of view to put to the meeting.
- ➔ A health and safety committee meeting with management to discuss and negotiate a risk situation discovered by the union.
- ➔ A meeting of the women's committee to reach consensus on a new policy to support gender equality in leadership.

- ➔ A meeting of workers in the informal economy called by the union leaders to try and recruit them.
- ➔ Policy negotiations with the government on the privatization of a public service.
- ➔ Meetings with the press or a television interview to introduce a campaign to people who are critical of the union.
- ➔ A formal union meeting with standing orders and rules of debate, where decisions are taken regarding the union constitution.
- ➔ A wage hearing or collective bargaining situation.

*If the task sheet is not clear, learners will waste time trying to understand it*

### The task sheet will consist of:

<p><b>The problem situation</b></p>	<p><b>Describing the problem</b></p> <p>What happened, who was involved, where did it happen, what was the situation prior to the problem occurring?</p>
<p><b>The background</b></p>	<p><b>Describing facts and the history</b></p> <p>The number and names of the characters, for example, a manager and the shop stewards, explaining why they are meeting and what they are trying to achieve.</p>
<p><b>The scenario</b></p>	<p><b>Describing the environment</b></p> <p>Does it take place at the workplace, the union office, the management office, the courts? What time of day does it take place? Who will be there? How many groups will there be and what do they have to do? The role of observers, so that they are involved.</p>

### *Use unambiguous language and keep it simple*

- ☒ ***Only include necessary information***
- ☒ ***Create realistic characters***
- ☒ ***Do not include hidden tricks***
- ☒ ***Check to make sure it makes sense and is possible***

*Role playing helps learners to see how others react to their behaviour or attitudes*

## The processes for conducting role plays

Role plays ask people to act out a problem situation that is as near as possible to real life. They provide learners with the opportunity to ‘think’, ‘talk’, ‘feel’ and ‘do’ in one exercise. Because of this, they can provide insight and awareness about solving problems and changing behaviour.

Example: if a shop steward’s usual negotiating style is loud and aggressive, the role play provides an opportunity to see what effect this has on other people. The shop steward can experiment with other types of behaviour, discover which works best and decide to adopt a new type of behaviour.

*This can only happen if the process of conducting role plays is fully implemented by the educator.*

### *The educator’s responsibilities in processing a role play*

<b>Before the session</b>	<ul style="list-style-type: none"> <li>▶ Choose the locations for the role play and for the groups to prepare</li> <li>▶ Check that the furniture, task sheets and equipment are ready</li> <li>▶ Allocate learners to groups and put the names on a flip chart (this saves time and ensures a mix of experience in each group)</li> </ul>
<b>Introducing the role play</b>	<ul style="list-style-type: none"> <li>▶ Hand out and explain the task sheet and purpose, and check that people understand</li> <li>▶ Describe the debriefing, feedback and review process in detail, and reassure people there will be no judgmental comments</li> <li>▶ Read out the names of the people in each group</li> <li>▶ Set clear time frames</li> </ul>
<b>Preparing for the role play</b>	<ul style="list-style-type: none"> <li>▶ Check on the groups to make sure that they understand the task</li> <li>▶ Do not assist with the task, or intervene with advice on solving the problem or selecting people to play the roles</li> <li>▶ Monitor the time and give a ten minute warning before the time is up</li> </ul>
<b>The role play</b>	<ul style="list-style-type: none"> <li>▶ Start the role play when everyone is ready and explain that it will be stopped at the allocated time</li> <li>▶ Monitor learners’ feelings</li> <li>▶ Only intervene if the role play is upsetting or misleading people, or they are not taking it seriously</li> <li>▶ Stop the role play and ask questions to find out what is happening</li> <li>▶ Start the role play again with different actors if everyone agrees</li> </ul>

**Debriefing,  
feedback and  
review**

- ▶ Keep the actors in their seats and ask each person how they feel. At this stage, focus on feelings, not the outcome of the role play. If people are feeling angry or upset, ask probing questions to find out why. Encourage them to talk about it so they do not take the anger away with them.
- ▶ Ask the actors how they felt about their strategy and the outcomes of the role play, and whether they would change anything
- ▶ Next allow the observers to ask the actors questions. If anyone makes a judgmental statement or criticism, ask them to withdraw it and rephrase it as a question.
- ▶ After the observers have commented, the educator asks questions
- ▶ When there has been sufficient discussion, ask people to go back to their plenary seats and ask them overhead questions, e.g. about what people learnt from the role play, what they could have done differently to achieve an acceptable outcome, why they did or did not finish and what their next steps would be
- ▶ Finally, summarize the points raised by the learners and link them to the session objectives and the problem-solving model





# HAND-OUT 17

## Course design

### THIS HAND-OUT COVERS:

- ▶ Introducing course design
- ▶ An eight-step model

### Introducing course design

The principles set out in this hand-out can be applied to any type of course or education event, and are similar to planning a session, although with more elements.

It is difficult to envisage exactly what will happen in a course until it has been conducted at least once.

*No course design is perfect because union education is learner centred*

*What works for one group may not work for another*

*For example, how long will people take to do an exercise, or will they struggle with a concept or skill?*

What may seem logical on paper is not always logical in practice.

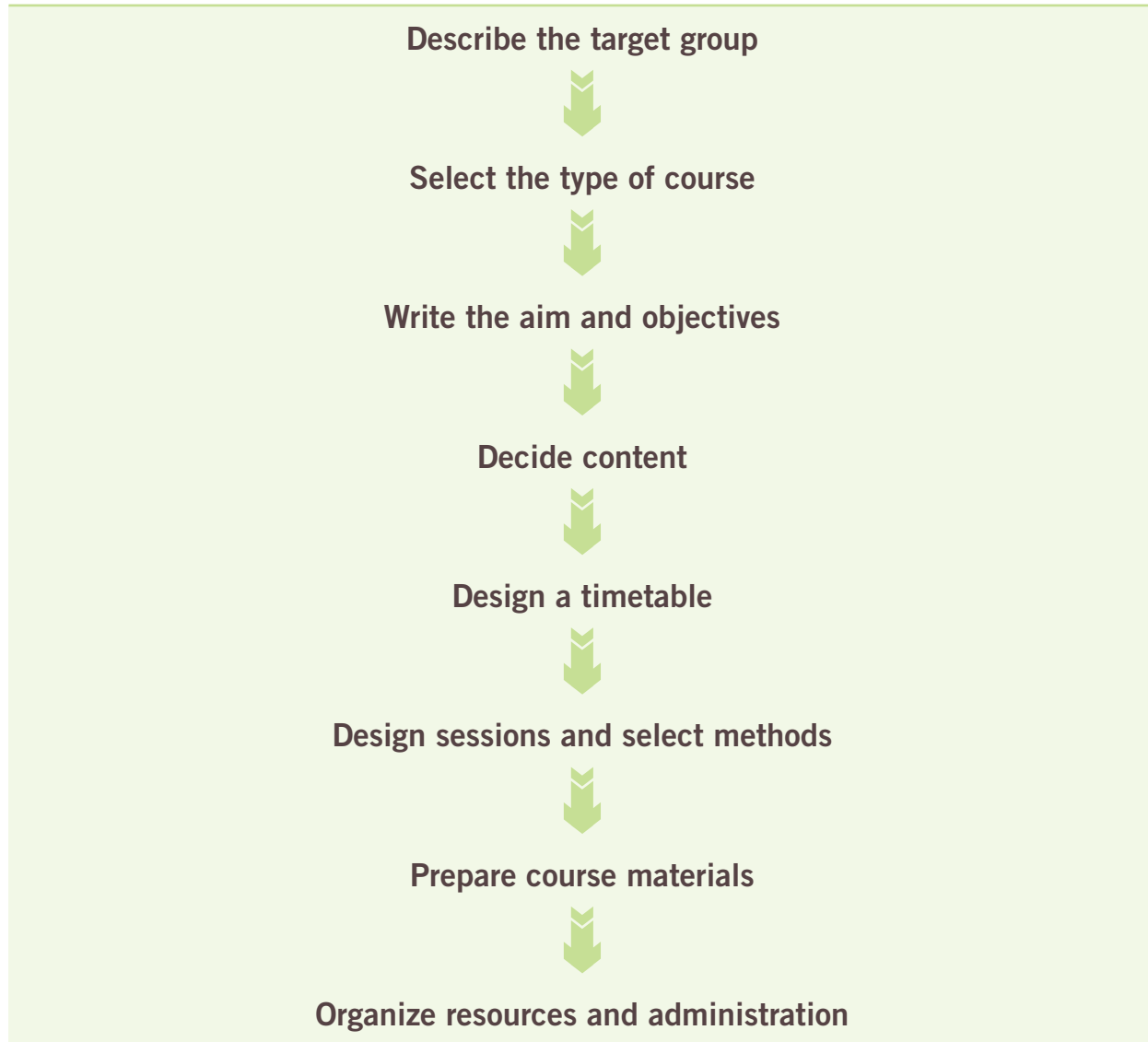
- ★ A course design is never ‘set in concrete’ because learners are always different. **No two times a course is conducted are the same.**
- ★ **Courses are dynamic and need to be constantly updated** and amended for different target groups.
- ★ There can be a **basic course design**, but it should always be amended to suit the needs and situations of the target group.

There are many different ways of designing a course. They range from highly complex models and flow charts, to an informal approach in which courses are developed from learners’ experience at the beginning of the course.

The following eight-step model recognizes that courses are part of a union education programme and that there therefore needs to be accountability to both the union and the learners.

## An eight-step model

Each step links into the next. If one step proves to be difficult, the previous steps may need to be amended.



## Step 1: The target group

The learners, who the course is intended for, are always the starting point. It is the responsibility of the educator to know who the learners are and to develop a general profile of them.

**To develop a general profile of the target group, ask the following questions:**

### **Where do they come from?**

- ★ The type of workplace or sector, the location, union or country.

### **What do they do at the moment?**

- ★ The type of work and the position that they hold in the union.

### **What are they expected to do?**

- ★ Their responsibilities and tasks in the position or job that they hold.

### **What level of experience do they have?**

- ★ The length of time they have been in the union or their job, and any other courses they may they have attended.

### **What is likely to be important for them?**

- ★ The topics, knowledge and skills that will be relevant to the work that they do or their role in the union.

### **What characteristics are they likely to have?**

- ★ Culture or ethnic origin, education or economic background, and the gender mix of the course.

*A labour law course prepared for shop stewards will be different if the target group are full-time union officials*

This information is gathered from registration forms or from the unions. If it is a mixed course of workplace representatives, the type of work they do or the sector they come from can give clues to assist with planning.

## Step 2: The type of course

In today's work environment, a traditional one- to five-day course may not be realistic for the target group.

People work long hours or shifts, and very few collective agreements or laws provide for the right to paid union education leave. Women who have families to care for face special difficulties.

Women casual workers may not be able to afford to take time off from work to attend a two- or three-day course or workshop.

### *The selection of the type of course is influenced by*

<b>Availability and needs of learners</b>	<ul style="list-style-type: none"> <li>▶ Leave arrangements and hours of work</li> <li>▶ Where the learners are located, at work or at home</li> <li>▶ Special needs, such as child care, people with disabilities or language differences</li> </ul>
<b>Organizational resources and needs</b>	<ul style="list-style-type: none"> <li>▶ The funding and human resources available</li> <li>▶ The educator's skills and knowledge, or the availability of suitable resource people</li> <li>▶ Scheduling with other union events, such as annual general meetings or conferences</li> <li>▶ The type of venues available or the location of the union office</li> </ul>
<b>The topic and methods</b>	<ul style="list-style-type: none"> <li>▶ The number of learners</li> <li>▶ The type of space needed to practice skills or role play</li> </ul>

### *Examples of different types of courses and other activities*

<b>Training courses as blocks of days</b>	<ul style="list-style-type: none"> <li>▶ Offered as short or long courses in days or weeks</li> <li>▶ Usually organized for elected union officers or paid union employees, from the workplace to the national level</li> <li>▶ Often part of a generic programme and linked to union roles and responsibilities</li> </ul>
<b>Courses spread over a period of time</b>	<ul style="list-style-type: none"> <li>▶ Offered for one day or a few hours a week in the form of modules over a period of time, such as two months</li> <li>▶ Often an alternative to blocks of courses</li> </ul>
<b>Workshops</b>	<ul style="list-style-type: none"> <li>▶ Offered over two or three days, focusing on a single issue</li> <li>▶ Used for internal union issues, such as policy or campaign planning, or introducing a topical union issue</li> </ul>

<b>Conferences or seminars</b>	<ul style="list-style-type: none"> <li>▶ Offered over a few days and focusing on a single issue to accommodate a large number of participants</li> <li>▶ Used to raise awareness of a topic with invited resource persons and facilitators, or to develop policy positions</li> <li>▶ Use some form of group work</li> </ul>
<b>Online or distance learning</b>	<ul style="list-style-type: none"> <li>▶ Offered as skills and knowledge courses on specific topics, such as research</li> <li>▶ Usually conducted in modules spread over a set period of time</li> </ul>
<b>Study circles, discussion groups or meetings</b>	<ul style="list-style-type: none"> <li>▶ Offered at or near the workplace by trained peer educators, focusing on one topic to raise awareness and commitment to the union</li> <li>▶ Usually held for short periods (one or two hours) over a set time frame</li> </ul>

### Other types of learning

Can be organized for individuals or small groups of people, such as mentoring, secondments, study tours, tertiary accredited courses or on-the-job training.

### Residential or non-residential

Courses, workshops and seminars can either be residential or non-residential, although it is not always possible to hold a residential course.

Residential courses need more human and financial resources, but can increase learning impact and help to develop collectivism and commitment to the union.

Evening sessions can provide opportunities for inspiration and motivation to support international and national union struggles.



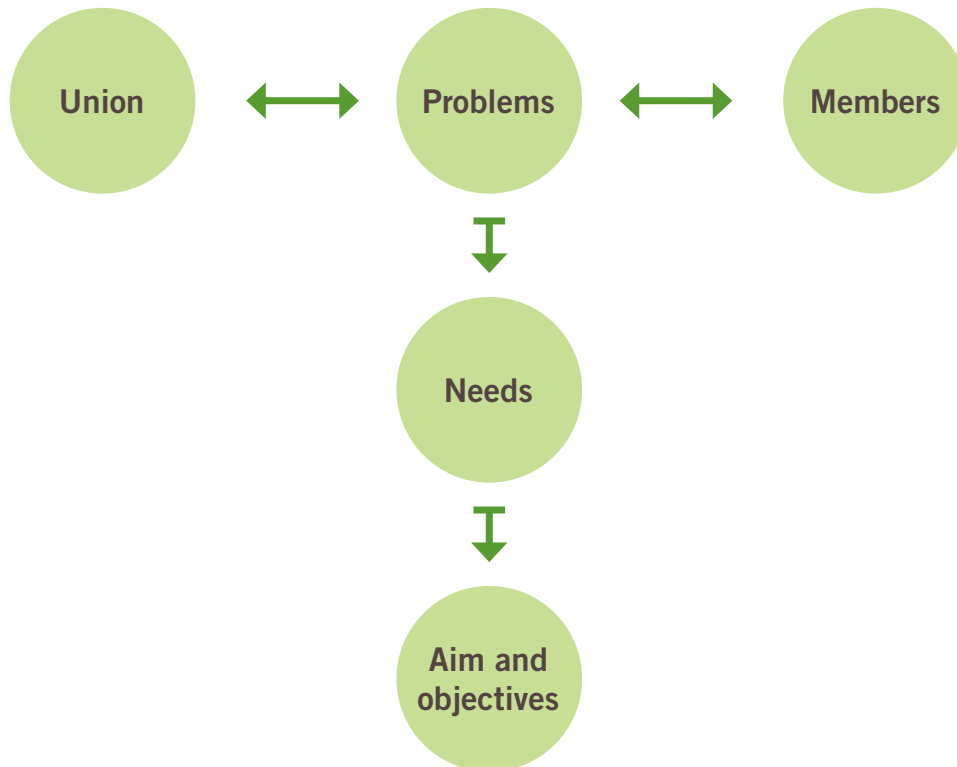
### Step 3: Aim and objectives

This step ensures that the course is relevant to both the union and to learners, and is an essential guide for selecting content and methods.

#### The aim and objectives:

- ★ Inform the union and the learners of the expected outcomes and the content of the course
- ★ Take into account the target group, the type and length of the course, and the union's requirements.

*If the session is difficult to design, check the course objectives and see if they need amending*



**The aim** summarizes the purpose and overall outcome of the course.

**The objectives** summarize the learning outcomes.

Example: the union leadership has requested a course for newly elected branch executive committee members (the target group). Attendance and participation in union meetings has dropped and employers are taking advantage of the situation to speak against the union.

**The educator has decided to conduct one-day training courses in five regions, each with 20 learners** (the type of course).

*The title of the course is 'Making meetings work for the union'.*

**Aim:**

To ensure union meetings result in positive union strategies that actively involve all members

**Objectives:** at the end of the course branch executive members will be able to:

- \* Describe the purpose and role of union meetings
- \* Organize meetings and prepare agendas that take into account the availability of members
- \* Conduct meetings in a way that encourages member participation
- \* Send the union regular reports and implement decisions effectively



## Step 4: Course content

Selecting the content of a course always creates a dilemma for the educator.

*The dilemma relates to which parts of the topic to include and which to leave out.*

- \* Including too much does not leave enough time for meaningful practice, and the learning objectives may not be attained.
- \* The educator needs to bear in mind the learning principles when selecting content, because people learn best when they can share experiences, discuss new information and practice skills.

*The choice is between doing a little deeply, or a lot superficially*

HAND-OUTS

Categorizing content into information that is **essential, useful or peripheral** provides a guideline for selection.

**The educator can:**

- \* **Brainstorm all the possible topics** that could be included
- \* **Divide them between the three categories**, taking into account the learning objectives and problem
- \* **Select the content from the essential list**, discard the peripheral list and select items from the useful list only if there is sufficient time

*If there are too many items in the essential list, either the aim or objectives need to be re-written or the course needs to be longer.*

### *In the 'Making meetings work for the union' course*

<b>Essential:</b>	Meeting procedures, purpose of meetings, planning and organizing meetings, the skills of chairing and facilitating participation, reporting and
<b>Useful:</b>	Strategic planning and problem solving
<b>Peripheral:</b>	Debating skills, writing a motion, current union policies, campaigning, public speaking



## Step 5: The timetable

A timetable needs a logical flow so that learners are not confused.

*A course design is not an ad hoc collection of sessions.*

Following some basic principles can guide the educator when constructing the timetable.

### Put the content in order

- \* Give the course a beginning, a middle and an end.
- \* Build new information onto existing information.

*Go from:*

The concrete	»»	to the abstract
The known	»»	to the unknown
The general	»»	to the specific
The present	»»	to the past or future

Use the experience of the learners by building confidence and trust. Allow them to demonstrate what they already know and can do.

*Giving a lecture in the first session leads to the assumption that the learners know nothing, sets the educator up as an expert and prevents participation and discussion.*

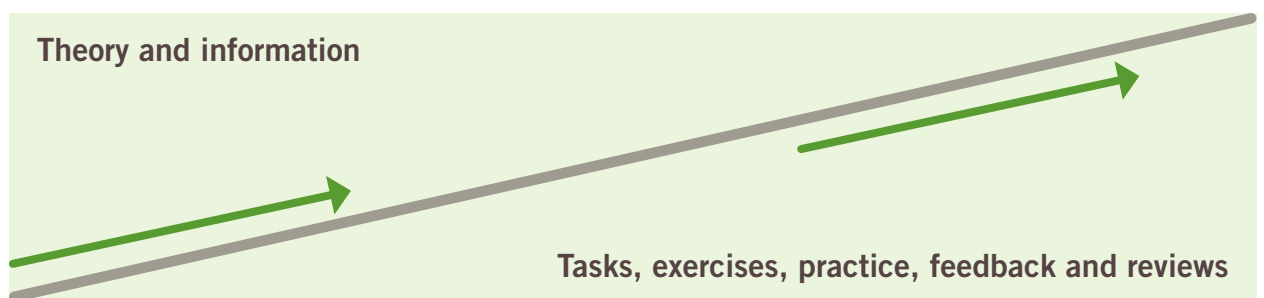
### The best way to 'learn'

<b>Feeling comfortable</b>	<ul style="list-style-type: none"> <li>▶ Start the course with introductions and ice-breakers</li> <li>▶ Start each session by sharing experiences</li> <li>▶ Give time for administrative details and expectations</li> <li>▶ Have regular breaks in between sessions, and watch out for drowsiness after lunch</li> </ul>
<b>Build in variety</b>	<ul style="list-style-type: none"> <li>▶ Use a range of exercises to prevent boredom (not just small group work followed by reporting back)</li> <li>▶ Change the pace of exercises and activities, and use energizers to ensure quality participation</li> <li>▶ Alternate information with exercises, and use short presentations after or before exercises</li> </ul>
<b>Reflection and review</b>	<ul style="list-style-type: none"> <li>▶ Include pauses during and between sessions to allow learners to think about what has been said, and make time for feedback and reviews</li> </ul>



<b>Thinking and analysing</b>	<ul style="list-style-type: none"> <li>▶ Use exercises that challenge learners so that they can go back to their workplaces able to deal with problems</li> <li>▶ Write exercises that prepare learners for real life situations</li> </ul>
<b>Positive and satisfying</b>	<ul style="list-style-type: none"> <li>▶ Create positive experiences, so that learners have a sense of progress</li> <li>▶ Make sure there are opportunities for learners to succeed</li> <li>▶ Build in exercises for people to practice a skill, if possible more than once</li> <li>▶ Create space in reviews to compare positive with negative experiences</li> <li>▶ Make the course an enjoyable experience, in contrast with the stressful work environments of learners</li> </ul>
<b>Balancing theory and practice</b>	<ul style="list-style-type: none"> <li>▶ Make sure that practice and theory are complementary, one following the other</li> <li>▶ Provide information at the beginning of the course, and gradually increase learning-centred practice towards the end</li> </ul>

*For example*



**Organizing learning**

There are three elements to organizing the learning process throughout the course.

These are important because they help people not only to learn, but also to change the way they do things, take on a more leadership style role or become focused on activism.

*The design of the course must make sense to the learners*  
*It should have unity, and not be a series of unrelated sessions*

***The first is 'continuity'***

This takes place when the major skills and or knowledge of the course are clearly identified in the objectives and repeated throughout the course.

For example:

- ✱ In the 'Making meetings work' course, running a meeting is the major skill, so the practice needs to be about running a meeting
- ✱ In a course on sexual harassment, the practice is developed around an issue or principle, and this will be the theme of each exercise

### ***The second is 'sequencing'***

This builds on repetition, by making each exercise more complex and taking learners on to higher skill or knowledge levels.

- ✱ In the meetings exercise, the practice can begin with one part of running a meeting, such as writing an agenda or discussing the role of the chair, and finish with a role play of a meeting.
- ✱ In the sexual harassment course, the first exercise can deal with people's own attitudes towards harassment, followed by an exercise to identify the different scenarios of harassment, and it could finish with the development of a workplace policy.

*The course should take learners from the simple to the complex*

### ***The third is 'integration'***

This ensures that there is an understandable logic to the course. Each session is connected with the next, resembling how things happen in the real world.

- ✱ The course on meetings starts with planning, moves to conducting the meeting and finishes with reporting. A course on informal meetings would not include a session on formal procedures, because it would be an unrelated topic.
- ✱ The sexual harassment course starts with the causes and context of harassment, followed by its impact on people, and finishes with prevention and handling complaints.

*If there is a skill plus an issue, the issue becomes the vehicle for practising the skill*

## Timing

A timetable without flexibility makes it difficult to be responsive to learners' needs or to factor in the unexpected.

Learners might find a topic difficult and need more time to practice a skill, or a plenary discussion may take longer than anticipated, but cannot be cut off mid-way.

If the preparation time is too short, learners will be frustrated, which leads to failure.

### *Making room for flexibility*

- ✦ Double the time you think it will take to conduct an exercise, and include the time it takes to move people into groups
- ✦ Factor in time to prepare the task and to move learners into groups
- ✦ Keep the exercises simple, without too many components. Tasks should not have more than two questions.

*If there is time over, use it for discussion or feedback*

*Or let people leave early*



## Step 6: Sessions and methods

Prepare each session, following the guide in Hand-out No. 8 (Planning a session). Make sure that each session leads into the next, but is at the same time a stand-alone unit.

Write the learning objectives and select exercises for each session which provide the skills and knowledge identified in the objectives. Make sure that short, simple, collective exercises are used at the beginning of the course to develop trust.



## Step 7: Course materials

These are selected and written to complement the session plans after the educator has developed a clear idea of what is needed.

### **Hand-outs**

Background information needs researching. Sometimes materials can be used as they are, but usually the educator needs to write specific hand-outs for the particular course and target group.

*Articles can be printed out or links given to additional reading to back up hand-outs*

They are a future reference for the learner when putting the skills and knowledge into practice in the working or union environment.

**Make sure hand-outs are consistent with the topic of the session.**

### **Task and exercise sheets**

These range from task instructions to a role play with case studies. Make them simple and clear. Ask someone else to read them to check that they are not confusing. **Ensure they are prepared before the course starts.**

Other materials may include Power Point presentations or other visual aids, such as DVDs. **Test them before the course starts.**



### **Step 8: Resources and administration**

Check the venue. Make sure that all the necessary equipment is in working order and that boards are clean and marker pens have not dried out.

Ensure that resource persons are notified well in advance and have sufficient information to plan their input. **Have an alternative, such as a DVD, ready in case of a cancellation to avoid a gap in the course.**

Check on refreshments and accommodation, and ensure that financial issues do not interfere with the conduct of the course.

*Finally, include an evaluation process, as described in Hand-out No. 18*



# HAND-OUT 18

## Evaluating a course

### THIS HAND-OUT DISCUSSES:

- ▶ An evaluation process
- ▶ What and how to evaluate
- ▶ Writing a questionnaire
- ▶ Using the information

*Evaluation is an ongoing process that starts at the planning phase*

HAND-OUTS

### Evaluation is important for two main reasons:

- ★ **To be accountable to the union.** The union can check whether the courses and sessions are supporting members and strengthening the union.
- ★ **To improve what we do as educators.** Courses and sessions are responsive to learners' needs and strengthen the union.

## ■ An evaluation process

Every course needs an evaluation plan that includes exercises and methods for gathering information.

### Monitoring during the course

An educator needs to monitor a course from the beginning so that, if things go wrong, they can be changed immediately.

#### **Questions to help the educator to observe what is happening:**

- ★ **The physical environment** - is it too hot or cold? Are people comfortable? Are there enough breaks for people to reflect?
- ★ **The atmosphere** - are people interrupting each other or coming in and out of the sessions. During the breaks, are people socializing or standing by themselves?
- ★ **Participation and contribution levels** - are people joining in discussions and contributing in small group work? Are the results of the exercise as anticipated? Is there less shyness as the course proceeds, or is a small group dominating?

*The process should always be designed to suite the target group*

**Listening and observation** helps in finding out the problems that people are experiencing. Talking about them with the learners and making changes can improve the learning impact and environment.

## Evaluating during the course

The most common way to evaluate a course is to hand out a questionnaire at the end, but a questionnaire should not be the only method used.

**When gathering information, it is important to note that:**

- ★ If the questions focus on feelings rather than what was learnt, the responses will be emotional rather than reflective.
- ★ During a long course, it is easy to forget what happened at the beginning of the course.
- ★ Can everyone express themselves in writing? Differing language and literacy levels can skew the results and need to be taken into account when planning the evaluation process.
- ★ Ranking sessions by how much a learner liked them is unhelpful because it does not tell the educator 'why'.

*Keeping notes about what happens for future reference can prevent future problems*

Plan a combination of evaluation methods throughout the course. The process can be discussed and agreed upon during the introductions.

**For example:**

- ★ **A questionnaire** can be handed out at the end of each day and learners asked to fill it in during the evening, or a chart could be put on the wall for people to contribute during the course.
- ★ **A review** can be held each morning before the first session begins during which the educator poses some questions, such as: What did you learn most from yesterday? How did you feel about a task or exercise?
- ★ **A plenary discussion** can be held at the end of the course before the questionnaire is handed out so that learners can speak as well as write about what they have learned. This is best done by bringing people away from their desks and into a circle.

*A daily review should not be one person describing what happened during the day*

*Everyone was there, so they know what happened*

### Participatory exercises

- \* 'The tree of experience' ice-breaker exercise has an evaluation process. At the end of the course, people write what they will take away with them on coloured cards and paste them onto the tree.
- \* Wall charts can be created to help learners recall their different reactions during the course. Coloured cards or symbols can be pasted onto flip charts.
- \* Ask learners to bring an object to describe the impact that the course has had on them, or to draw a picture.
- \* Ask small groups to create a sculpture, mime or song to demonstrate what they learnt the most.

## ■ 'What' and 'how' to evaluate

Educators need to learn from evaluation. So the questions and exercises must therefore be able to produce information that can assist them to improve the course and report to the union.

### The learning objectives

*Evaluating objectives during or immediately after a course only gives limited information about long-term change, but is important to improve the course:*

- \* The way learners work on tasks or perform in role plays gives clues as to whether the exercise was right for a particular skill or for integrating new information.
- \* Questions framed around the objectives, and the way they are answered, can show whether people feel confident about reproducing the skills learned after the course.

### The structure, content and design of the course

*Information about the logic and relevance of the course provides indications for making changes.*

- ➔ Use the steps of course design as a guideline for formulating and asking questions.
- ➔ Observe learners' reactions and responses to information. Contributions tell the educator whether people are confused or focused.
- ➔ Ask questions about the relevance and logic of the content.

## Materials and hand-outs

*Hand-outs are an essential back up for learners when they return to their workplace or union, but their usefulness only becomes evident in evaluations carried out later.*

- \* Questions can be included in a questionnaire or discussion, such as: 'How will you use the hand-outs?'
- \* Observe whether people read them, keep them neatly in folders, or leave them on the desk.
- \* Find out whether materials such as DVDs, visual aids and task sheets are relevant.

## Administrative details

*It is useful to know learners' views on registration, the venue, travel arrangements, food and other issues, but these should not be the focus of an evaluation.*

- \* The educator could place a box in the room and ask people to put in comments for future reference.

*If the course is boring or not relevant, people are more likely to complain about other things*

## The educator and resource persons

Educators must be prepared to evaluate themselves and the planning phase.

*Questions that ask people to rank educators and resource persons do not provide useful information or an explanation of the ranking.*

Peer evaluation is more constructive. When there is more than one educator, they can sit together after the course and analyse what did and did not work. If there were problems, the educators can analyse how they handled the situation and work out how to improve in future.

Having another educator as an observer can also be a useful way of assessing style and approach.

*Conducting courses and sessions is a learning experience for educators, as well as for learners*

*If something went wrong, never blame the learners. Look back and reflect on what happened and why it happened. Be prepared to change.*



## ■ Writing a questionnaire

- ✱ Keep it short and simple, and factor in the literacy levels and first language of the target group.
- ✱ Ask open and probing questions using 'how', 'why' and 'what'.
- ✱ Focus on finding out what people think they have learnt and how they will use it.
- ✱ Avoid using ratings, as it is not possible to know the criteria that are used by learners when responding.
- ✱ Include questions about the tasks, materials and how learners felt about contributing in exercises.
- ✱ Ask what they would have liked more or less of, and what they would change.
- ✱ Thank them for completing the questionnaire and tell them it will be used to improve the course.

If all learners have e-mail addresses, the questionnaire can be sent after the course with a deadline for it to be returned. However, learners usually need to be followed up.

- ✱ How well were your expectations met by the course?
- ✱ How will you be able to apply what you learnt in your union work?
- ✱ Which parts of the course were most useful to you and why did you find them useful?
- ✱ What would you like to change and why?
- ✱ From a personal point of view, what did you achieve and how will it change how you do things?
- ✱ How did you feel about your levels of contribution and participation? What could have improved your level of participation?


## ■ Using the information

If the educator has time, it is better to read the questionnaires and make notes immediately after the course.

The responses and feedback received during and after the course need to be used to make changes, otherwise the educator is not acting in good faith.

***There will be different types of responses. When analysing the responses, look for themes or constants.***

- \* If there are only one or two complaints about something, analyse why those people made the comments. It could have been during a part of the course where there were tensions between people. It could also have been the attitude of the educator at that time.
- \* Check whether the comments made by learners are consistent with your own comments. If we are being honest with ourselves, they are usually much the same.



*As time goes by,  
it is easy to forget  
what happened in  
a course*

After analysis and time for reflection, the educator can then make rational decisions about what to change and prepare a report for the union.

The report should also be sent to the learners as a sign of respect and inclusion, demonstrating that the union takes the education programme seriously.



# TASK SHEET 1

## Designing an action method exercise

### THIS TASK AIMS TO GIVE YOU THE OPPORTUNITY TO:

- ▶ Practice writing and using action method exercises
- ▶ Design an exercise that you can use in your own programme

### In your nominated groups:

- Decide on the name and target groups for a session
- Select a topic for the session and write a learning objective for the exercise identifying the knowledge, skills, attitude and behaviour (KSAB) that will be learned
- Select an action method exercise to suite the topic and KSAB from the hand-out, or choose your own
- Design a 15 minute exercise with questions and actions
- Remember to leave time for discussion to summarize the learning

Prepare to conduct the exercise using the members of another group as learners.

***Introduce the exercise by describing the target group, the purpose of the session, the type of course and the purpose of the exercise.***

🕒 Preparation time is 30 minutes.



## TASK SHEET 2

### Writing and conducting a role play

#### THIS TASK AIMS TO GIVE YOU THE OPPORTUNITY TO:

- ▶ Write a task sheet for a role play describing the setting and scenario and giving instructions
- ▶ Practice conducting the role play with a small group of learners

#### The task is in two steps:

1. Writing a role play
2. Conducting a role play

### Step one

#### *In your group*

- ➔ Select a problem from the list on the board that is common to all group members
- ➔ Decide on the target group, the type of course and decide the skills that the learners will practice
- ➔ Write a task sheet that includes: the problem, the background and the scenario, with characters and instructions for conducting a 30 minute role play (see Hand-out No. 16)

The group that your group will join in the next step will role play your learners.

🕒 Preparation time is 30 minutes.

Be prepared to share the problem and skills that your role play deals with in the plenary.

### Step two

#### Each group takes it in turns to conduct the role play by:

- ★ Introducing the task sheet
- ★ Providing ten minutes for preparation
- ★ Observing the role play

- \* Debriefing the people in the role play
- \* Facilitating feedback

The members of the group should share the facilitation of the role play and take notes on points to be discussed in plenary when the role plays have been concluded.

## Plenary review

The groups will share their experiences of conducting the role play.

**Feedback will be based on the following criteria:**

- \* How the learners dealt with the problem
- \* If the skills practiced in the role play were relevant to the problem
- \* The clarity of the task sheet
- \* The level and type of debriefing



## TASK SHEET 3

### Designing a course

#### THIS TASK AIMS TO GIVE YOU THE OPPORTUNITY TO:

- ▶ Design a short union training course using the principles of course design
- ▶ Work collectively in a small group

#### In your nominated groups design a short course for shop stewards:

- ➔ Select a target group and prepare a profile
- ➔ Decide on the type/form of the course and indicate why you chose the course
- ➔ Write an aim and three or four learning objectives for the course
- ➔ Describe the knowledge, skills, attitude and behaviour (KSAB) that the course covers
- ➔ Decide on the content, remembering to select topics carefully that can be covered in the length of the course
- ➔ Create a timetable
- ➔ Write two or three learning objectives for each session
- ➔ Describe the course materials that will be needed

**Type/print out your course design on A4 paper and make enough photocopies to hand out to the learners and educators.**

🕒 You have 60 minutes to prepare the course.

#### Reporting back in plenary

**Prepare to present a summary of your course design, giving all the members of the group a role in the presentation. Demonstrate the reasons for your choices.**

#### Feedback and review

**You will receive feedback on the following:**

- ➔ The consistency of the aim and objectives with the sessions and exercises
- ➔ The amount of content in the course and the timing

- ➔ The structure of the course, including:
- The order of the content
  - Continuity, sequencing and integration
  - The balance of theory and practice
  - The variety of exercises

*The educators will be available:*

- \* *To answer questions and provide feedback during the preparation phase*
- \* *To assist with typing and photocopying*



## TASK SHEET 4

### Conducting a 60 minute session

#### THIS TASK AIMS TO GIVE YOU THE OPPORTUNITY TO:

- ▶ Practice writing and conducting a session from your course design task
- ▶ Work collectively in a small group

You will work in the course design group

#### Preparation

- \* Select a session from the course
- \* Write two or three learning objectives
- \* Discuss and select two different types of exercises that can meet the learning objectives in the time available
- \* Write a session plan to hand out to the plenary
- \* Prepare to give no more than 15 minutes of information with visual aids

#### Remember

- \* **Not** to put a 90 minute session into a 60 minute session
- \* Use at least two short exercises and one longer exercise - try something you have not used before and be creative
- \* One exercise should be a role play, a task with a case study or a DVD with a problem-solving exercise.

#### Conducting the session

- ➔ You will conduct the session for a small group who 'role play' your learners.
- ➔ Give all the group members a chance to present a part of the session



## Review

### Feedback will be given on:

- ➔ How you involved the learners
- ➔ The relevance of the exercise to the objectives
- ➔ The type of questions you asked and how you handled responses
- ➔ The logic and flow of the session
- ➔ How the time frames were managed

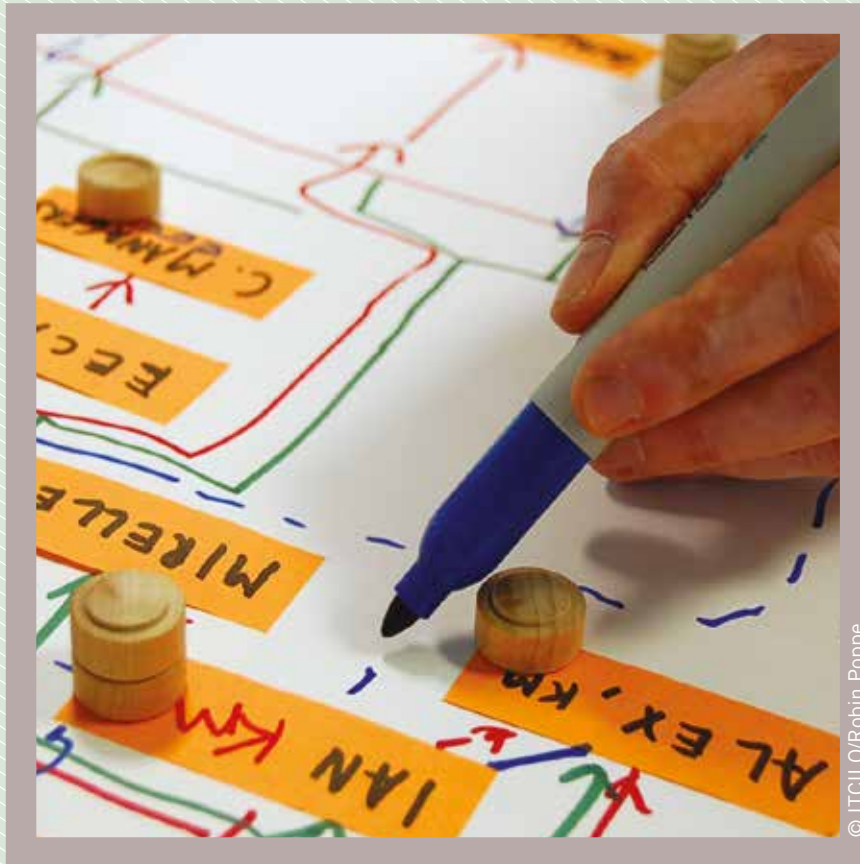
🕒 You have 2 hours to prepare.

**Ask the educators if you need any resources or assistance.**



# Module Three:

## Designing and managing a union education programme



- ▶ Course description
- ▶ Sessions
- ▶ Information for educators/hand-outs
- ▶ Task sheets





# > Module Three > contents

Designing and managing a union education programme

Course description .....	i
Timetable.....	iv



SESSION ONE: Welcome and introductions .....	1
SESSION TWO: Developing a union education policy .....	4
SESSION THREE: Training needs analysis .....	7
SESSION FOUR: Designing an education programme .....	9
SESSION FIVE: Managing a union education programme .....	12
SESSION SIX: Budgeting and managing finances .....	15
SESSION SEVEN: Evaluating a programme .....	18



HAND-OUT 19: Union education policy .....	1
HAND-OUT 20: Training needs analysis .....	9
HAND-OUT 21: Designing a union education programme .....	13
HAND-OUT 22: Managing a union education programme.....	17
HAND-OUT 23: Budgeting and managing finances.....	25
HAND-OUT 24: Evaluating the programme.....	29



TASK SHEET 1: Designing a union education programme.....	1
TASK 1 - Phase 1: Drafting an education policy.....	2
TASK 1 - Phase 2: Drafting a training needs analysis .....	3
TASK 1 - Phase 3: Planning an education programme.....	4



## Course description

### ■ Target group

- \* Experienced educators whose main role in the union is designing, managing and coordinating a union education programme.

It is preferable for participants to have attended Modules One and Two, or have at least three years' experience as an educator or education coordinator.

*Every course should aim for equal gender representation.*

### ■ Outcome

A union education programme, as an integral part of union activities, meets organizational needs, supports union policy and is effectively coordinated for the benefit of representatives and members.

*Each module has hand-outs to guide learners, as well as a timetable and session plans*

### ■ Description

The course builds on Modules One and Two in providing education coordinators with skills, knowledge and experience in the design and management of union education programmes.

Programme coordinators need experience in working for a union so that they can advise on the role that education can play in supporting the union's programme of action.

*This is the final module of the Handbook*

- \* It is designed for a **maximum of 15 learners** per course to allow time for the main task and reporting backs
- \* It can be conducted as a **three-day residential or a four-day non-residential** course.

The first two days of the course are designed around one main task, which is to be carried out in small groups and divided into the three phases of programme design. Each task follows a plenary information session.

- ➔ **Phase 1:** creating a union scenario and drafting a union policy
- ➔ **Phase 2:** planning for a needs analysis
- ➔ **Phase 3:** drafting a 12-month education programme

Smaller tasks on the third day provide learners with the opportunity to practice the skills of designing budgets and an evaluation process.

Groups should be set up so that learners can work with people from similar unions in terms of their size, structures and sector so that the results of the task can be adapted to their own union organization.

The third day of the course covers managing a union education programme, including administration, reporting, recruiting and budgeting.

## ■ Learning objectives/aims

**At the end of the course, participants will be able to:**

- ✦ Work with the union leadership to develop a policy on education that includes equality and equity issues and can be tabled for approval at a decision-making body of the union
- ✦ Carry out a participatory training needs analysis and produce a report for the union
- ✦ Plan and design a 12-month education programme that is based on union policy, a needs analysis, and factors in constraints
- ✦ Develop a realistic budget for an education programme
- ✦ Implement a management and reporting process for the programme
- ✦ Design a programme evaluation process that measures the impact of the education activities on policy implementation and actions

## ■ The hand-outs

These provide educators with the key information for planning, managing and implementing an education programme. They can be printed as they are for the learners, or adapted to suit a particular target group. They include guidelines and examples of ways of carrying out and analysing research.

**Part B of the Introduction, 'Educating for strength', is included as a hand-out for this module.**



## ■ Session outlines

The individual session plans follow the hand-outs and timetable.

### **Each session plan:**

- \* Explains the learning outcomes
- \* Identifies key points and information that need to be covered in each session
- \* Suggests ideas for exercises.

The 'Welcome and introductions' session assists people to work in groups, as they will be working in the same groups for the three phases of the major task. Educators monitor the groups and provide assistance when needed.

Each session follows the principles of popular or radical education, and begins with an activity that allows learners to share their experience and knowledge of the issues to be covered.

The group tasks and presentations allow the sharing of ideas and also give learners the opportunity to work with materials useful for their own union.

Each session ends with a summary of the learners' input, in the form of feedback or discussion, so that everyone can leave the session with a sense of achievement.

# Timetable

Basic training for educators course timetable (residential)			
Day One	Day Two	Day Three	Day Four
<p><b>1. Welcome and introductions</b> Introductory exercises Course description and administration</p> <p><b>2. Developing a union education policy</b> <i>Information and plenary discussion</i></p>	<p><b>Task 1, Phase 2: Drafting a training needs analysis</b> Preparation</p> <p><b>4. Designing an education programme</b> Information and plenary discussion</p>	<p><b>5. Managing a union education programme</b> Administration and reporting <i>Information, small group exercises and plenary discussion</i></p> <p><b>6. Budgeting and managing finances</b> <i>Information and small group exercise</i></p>	Departures
Lunch	Lunch	Lunch	Lunch
<p><b>Task 1, Phase 1: Drafting an education policy</b> Small group task</p> <p>Preparation</p> <p><b>3. Training needs analysis</b> <i>Information and plenary discussion</i></p>	<p><b>Task 1, Phase 3: Planning an education programme</b> Preparation</p> <p>Presentations of Task 1</p>	<p><b>7. Evaluating a programme</b> <i>Information and plenary discussion, exercises and a small group task</i></p> <p>Course evaluation and closure</p>	
Dinner	Dinner	Dinner	Dinner
Film evening	Presentations (cont.)	Course dinner	



# SESSION ONE

## Welcome and introductions

 **1 ½ Hours**



### Aim:

- ➔ To establish an environment that supports the learning process and assists learners to work well in small groups

### Learning objectives: at the end of the session learners will be able to:

- ➔ Share and use the experience acquired during the course
- ➔ Design and implement a realistic and accountable education programme for the union
- ➔ Conduct on-going programme monitoring and evaluation, and report the results to the union executive

### Materials:

- Flip chart, board and markers, name cards, post-it notes and coloured cards, tape
- course programme and description, course timetable and description, Introduction, Part B, sections 1 and 2

### Prepare:

(1) three pieces of flip chart paper joined together, with a horizontal line across the middle and pasted to a wall for the ice-breaker: (2) coloured A4 paper cut into postcard sizes

## Key points and information

Write list for introductions on the board.

Place pens and markers near the flip chart paper.

Explain that the purpose of the ice-breaker is to encourage people to think about how union education developed in their union and the part they played in this.

The exercise explores four questions asked separately:

1. *Where do I come from?*
2. *What influences union education?*
3. *How can we describe union education?*
4. *What do we expect from each other?*

2. *What influences union education?*

## Plan and exercises

### Introductions

- ▶ Ask people to write the name they want to be called by on the blank card in front of them and to introduce themselves briefly following the list on the board.

*If people are from different countries, have a round of pronouncing everybody's name.*

🕒 (10 minutes)

### Ice-breaker exercise in four steps

Ask people to bring their chairs to form a circle around the flip chart paper and to bring paper and a pen.

### Write the first question on the board

- ▶ Ask people to think of two significant events or influences that have shaped their work in the trade union movement and led them to being at this course, and to write them on a separate card
  - ▶ Facilitate the sharing of their experiences in plenary
- 🕒 (10 minutes)

### Ice-breaker exercise (cont.)

### Write the second question on the board

- ▶ Ask people to think of three significant events or influences that informed education programmes in their union, and write them on separate cards
- ▶ Facilitate the sharing of their experiences in plenary

### Ask people:

- ▶ How long they have been involved in union education and establish a time line on the flip chart paper
- ▶ Ask people to place their cards from questions 1 and 2 on the time line approximately when they happened, with the cards from the first question above the line and the second question below the line

Key points and information	Plan and exercises
<p>Explain that in the evaluation the groups will return to their metaphors and see if they would like to change them.</p> <p><i>3. How can we describe union education?</i></p> <p><i>4. What do we expect from each other?</i></p> <p>Explain that the course involves intensive group work with people working in the same group for most of the exercises.</p> <p>Summarize the responses to the four questions by asking probing questions.</p> <p>Give out the hand-outs and check people's understanding of the course.</p> <p><b><i>This session may take longer, but there is flexibility in the afternoon session to allow this.</i></b></p>	<p>Facilitate a plenary discussion to compare and identify how education programmes developed and what type of influence they have on the union.</p> <p>🕒 (15 minutes)</p> <p><b><i>Write the third question on the board</i></b></p> <ul style="list-style-type: none"> <li>▶ Ask people in threes to discuss and develop a drawing, 'metaphor' or 'mime' that describes union education today and write it on the flip chart paper</li> <li>▶ Facilitate sharing and unpack the metaphors, and note the responses on the board</li> <li>▶ Ask people if the results relate to their expectations of the course and discuss</li> </ul> <p>🕒 (15 minutes)</p> <p><b><i>Write the fourth question on the board</i></b></p> <p>Facilitate a discussion to determine the best way of working in groups and the values and attitudes that can prevent problems, and write the responses on the board.</p> <p>🕒 (15 minutes)</p> <p><b><i>Presentation of the course description, timetable and administration</i></b></p> <p>Set times for breaks and evening work.</p> <p>Ask people if they have any questions or concerns.</p> <p>🕒 (15 minutes)</p> <p>🕒 <b>TOTAL TIME: 90 minutes</b></p>



## SESSION TWO

# Developing a union education policy

 1 ½ Hours



### Aim:

- ➔ To assist educators to develop a policy direction for an education programme within a political, social and economic context

### Learning objectives: at the end of the session learners will be able to:

- ➔ Conduct a situational analysis for a union
- ➔ Construct a definition for union education that is consistent with the union's policy and values
- ➔ Write an aim & objectives for a union policy

### Materials:

- ☒ Flip chart, board and markers, paper, scissors and tape
- ☒ Hand-out No. 19, Task 1 and Task 1, Phase 1, task sheets

### Prepare:

(1) presentation with visual aids on Hand-out No. 19 in two sections (the situation analysis, pp. 2-3, and developing the policy, pp. 4-6): (2) find a union education policy to hand out as an example

## Key points and information

Explain that having a policy is the first step in developing a programme.

Write up the six headings of the areas of research (pp. 2 and 3 of the Hand-out) on the board.

*(The exercise can also concentrate on one area at a time)*

Give out Hand-out No. 19.

Select a method for setting up the groups. Either write up a list of names for each group or ask learners to self-select.

## Plan and exercises

### Plenary discussion: Sharing education policies

- ▶ Ask people if they have an education policy in their union and what it covers
- ▶ Invite people to share how the policies were developed and who was involved

Facilitate a discussion on the benefits of having a defined education policy and note the points on the board.

🕒 (20 minutes)

### Presentation of a situational analysis (1)

Introduce the presentation

#### Short exercise:

- ▶ Ask people to brainstorm the information needed for a situational analysis
- ▶ Nominate the area of research under which it should be listed

Continue until the lists are complete and add any items missed.

Explain the different ways in which information can be gathered.

🕒 (35 minutes)

### Presentation of developing the policy (2)

Use plenary questions to explore the key questions to be asked when developing a policy.

Give or ask for examples of policy objectives and recommendations.

🕒 (35 minutes)

### Introducing the main task

Give out Task 1 task sheet and introduce the three phases of the main task

1. Set up the groups
2. Introduce the first phase
3. Check understanding
4. Allocate spaces for each group to work

**Key points and information**

Prepare a table with materials for the groups.

Ask the groups to meet after the lunch break and begin preparing for the task.

**Plan and exercises**

Give out the Task 1, Phase 1, task sheet and explain.

🕒 (10 minutes)

🕒 **TOTAL TIME: 90 minutes**





# SESSION THREE

## Training needs analysis

 **1 ½ Hours**



### Aim:

- ➔ To assist educators to conduct a training needs analysis (TNA) to inform the design of the education programme

### Learning objectives: at the end of the session learners will be able to:

- ➔ Identify the information that is needed to analyse training needs
- ➔ Describe the different ways of gathering information
- ➔ List the tasks needed for the different union positions and identify skills and knowledge gaps in the union.

### Materials:

- Flip chart, board and markers
- Hand-out No. 20, Phase 2, task sheet

### Prepare:

Presentation with visual aid from Hand-out No. 20

Key points and information	Plan and exercises
<p>Stop the presentation for an exercise when the section on knowledge, skills, attitudes and behaviour (KSAB) is reached.</p>	<p><b>TNA presentation</b></p> <p>Use plenary questions and discussion to identify levels of experience</p> <p>🕒 (15 minutes)</p> <p><b>Small group exercise on KSAB</b></p> <p>In a plenary brainstorming ask people to call out the different positions in a union and list them on the board.</p> <p>Divide the learners into groups and give each group a position, or divide the positions between the groups.</p> <p><b>Ask the groups to list:</b></p> <ul style="list-style-type: none"><li>▶ The tasks carried out in each position</li><li>▶ The KSAB needed for each task</li><li>▶ The problems position holders may experience</li><li>▶ Write the lists on the flip chart</li></ul> <p>Hold a gallery report back to compare and discuss the lists.</p> <p>🕒 (30 minutes)</p>
<p>Hand out the Phase 2 task sheet and Hand-out No. 20.</p>	<p><b>Introduce the task</b></p> <p>Read through the task with the learners and answer any questions or concerns.</p> <p>They have 45 minutes to do the task, but there is no reporting back at this stage.</p> <p>🕒 <b>TOTAL TIME: 90 minutes</b></p>



## SESSION FOUR

# Designing an education programme

 4½ Hours



### Aim:

- ➔ To assist educators to design a realistic programme that meets the needs of the organization and learners

### Learning objectives: at the end of the session learners will be able to:

- ➔ Recognize the constraints on programme planning and factor them into programme design
- ➔ Write a narrative strategy for an education programme that incorporates the education policy, definition and training needs analysis
- ➔ Formulate a plan by selecting types of activities for the nominated target groups within an allotted time frame and budget

### Materials:

- Flip chart, board and markers, coloured paper and tape
- Hand-out No. 21, Introduction, Part B, Task Sheet 1, Phase 3

### Prepare:

(1) Presentation with visual aid from Hand-out No. 21 in sections: (2) hand-out of planning exercise example

## Key points and information

This session assists learners to bring together the information gathered in the situational and training needs analysis.

Explain that 'constraints' are issues that can place limits or restrictions on the design of the programme.

Summarize with points from Hand-out No. 21 on constraints.

Explain the difference between the narrative description and the work plan.

Describe a participatory method that groups can use to design a work plan which develops a visual picture of the plan.

***Encourage learners to use the example to develop the work plan.***

## Plan and exercises

### Buzz groups to share constraints in programme planning

- ▶ Ask people in buzz groups of three to discuss things that may go wrong with programme implementation
- ▶ Ask the groups, in turn, to give one of their responses, avoiding repetition
- ▶ Write the responses on the board and check that there are no other issues

Facilitate a discussion to categorize the issues, using coloured markers, into policy, accountability, finances and practicalities.

🕒 (20 minutes)

### Presentation on designing a programme

Use plenary questions on formulating the plan.

🕒 (30 minutes)

### Example of exercise for planning a work plan

Give out the hand-out of the exercise and explain:

- ▶ Use a large board or pieces of flip chart paper stuck together and pasted on a large wall
- ▶ Draw a horizontal time line across the paper representing the time frame for the programme
- ▶ Decide how to use the two halves (for different types of education activities or other union or national dates)
- ▶ Divide people into different groups and give each group a part of the programme to plan (e.g. type of course or activities for a specific target group)
- ▶ Prepare different coloured cards and in the plenary select colours for different parts of the programme

Key points and information	Plan and exercises
<p>Explain that this can be used in a number of different workshop situations to support planning processes.</p> <p>Ensure the groups have sufficient materials and equipment to carry out the task.</p> <p>Monitor the progress of the groups and ask for feedback where necessary.</p> <p>Advise the groups to take breaks when they need to.</p> <p>Leave enough time after the presentations for the review.</p> <p><i>The first presentation could be before dinner if the groups are progressing well.</i></p>	<ul style="list-style-type: none"> <li>▶ There will be a different card for each activity, which should include the name, target group, number of learners, location and date</li> <li>▶ Each group then places their cards on the time line</li> <li>▶ Bring the groups together to discuss the plan and make any necessary changes</li> </ul> <p>🕒 (10 minutes)</p> <p><b>Hand out Task One, Phase 3</b></p> <ul style="list-style-type: none"> <li>▶ Explain the task and time frames for the exercise</li> <li>▶ Check understanding</li> <li>▶ Ask the groups to begin preparation before the lunch break and to return to their groups after lunch</li> </ul> <p>Set the time for the start of the presentations.</p> <p>🕒 <b>TOTAL TIME: 90 minutes</b></p>



## SESSION FIVE

# Managing a union education programme

 1 ½ Hours

### Aim:



- ➔ To assist learners to explore efficient ways of managing and implementing a union education programme

### Learning objectives: at the end of the session learners will be able to:

- ➔ Describe an implementation structure that can manage constraints and progress
- ➔ Identify the tasks and responsibilities needed to implement a functioning programme
- ➔ Discuss ways to promote and recruit for a programme

### Materials:

- Flip chart, board and markers, different coloured paper or post-it notes
- Hand-out No. 22

### Prepare:

(1) presentation with visual aid on Hand-out No. 22 in two sections - reporting and recruiting; (2) cut coloured paper into postcard size pieces; (3) prepare three flip charts, each with one heading - administration support/coordinator/educators

**Key points and information**

When all groups have drawn a structure.

Check with the points on pp. 2 and 3 of the hand-out and add any that are missing.

**Plan and exercises**

**Buzz groups on implementation structures**

Divide learners into buzz groups of three.

**Ask each group to:**

- ▶ Share their current structures for implementing an education programme
- ▶ Design what they think would be an ideal structure and come up and draw it on the board

Discuss and compare the structures and ask questions about how structures are set up in a union.

🕒 (20 minutes)

**Group brainstorming on tasks and responsibilities**

Divide learners into two groups:

- ▶ Ask each group to brainstorm all the different tasks and responsibilities needed to implement an education programme, and write each one on a separate card
- ▶ Ask the groups to go to the flip chart and paste the cards under the relevant heading (other categories can be added)
- ▶ Facilitate the groups to reach a consensus on the lists and remove duplicate cards

🕒 (20 minutes)

Key points and information	Plan and exercises
<p>Explain that these points can form the basis for job descriptions.</p> <p>Use questions to discuss what types of reports people use, how they prepare and write them and who they are sent to.</p> <p>Summarize the responses and the importance of having an implementation structure and job descriptions for people with education responsibilities.</p>	<p><b>Identifying KSAB</b></p> <ul style="list-style-type: none"><li>▶ Divide people into groups, one for each piece of flip chart</li><li>▶ Ask them to list the KSAB needed for each task and responsibility and write them on the flip chart</li></ul> <p>Bring the groups together with the flip charts and briefly discuss the responses.</p> <p><b>Presentation on programme implementation and reporting</b></p> <p>🕒 (25 minutes)</p> <p><b>Presentation on promoting and recruiting</b></p> <p><b>Ask people:</b></p> <ul style="list-style-type: none"><li>▶ How they currently promote and recruit</li><li>▶ How they deal with low registrations and people not attending courses</li></ul> <p>(25 minutes)</p> <p>🕒 <b>TOTAL TIME: 90 minutes</b></p>





## SESSION SIX

# Budgeting and managing finances

 **1 ½ Hours**



### Aim:

- ➔ To ensure that education programme finances are accountable to the union executive

### Learning objectives: at the end of the session learners will be able to:

- ➔ Describe the process of preparing a budget according to agreed procedures
- ➔ Identify the contents of an education budget
- ➔ Prepare processes for recording, monitoring and reporting

### Materials:

- Flip chart, board and markers, post-it notes
- Hand-out No. 23, exercise task sheet

### Prepare:

(1) an energizer to use at the beginning of the session: (2) a presentation on Hand-out No. 23; (3) a task sheet for problem-solving exercise (see below)

**Key points and information**

Be strict on timing.

**To summarize**

- ▶ Emphasize that there is no right or wrong answer
- ▶ Compare the group results with the individual responses, and note if there is an improvement in the number of squares identified
- ▶ Explain that it is easy to jump to conclusions, two heads are better than one, and friendly discussion increases creativity

Use questions and discussion to involve learners in the presentation.

Emphasize that it helps to know the amount of funds available before preparing a budget.

Use questions and discussion to involve learners in the presentations.

**Plan and exercises****Energizer example: Squares exercise**

Draw a square on the board with 16 (4x4) squares inside the square.

**1. Ask individuals to**

- ▶ Study the drawing and note down the number of squares that they can see on a post-it (three minutes)
- ▶ Take the post-it to the educator

**2. Ask pairs to:**

Share the number of squares and try and reach a consensus (three minutes).

**3. Ask groups of four to**

- ▶ To compare each other's answers and reach consensus on the number of squares.
- 🕒 (five minutes)

**4. Ask the groups to share their answers in the plenary**

Note the responses on the board, and discuss how they reached their answers.

🕒 (20 minutes)

**Presentation on budgets**

A plenary exercise can be used to ask learners to brainstorm the contents of a budget under the headings 'Education' and 'Administration costs'.

🕒 (15 minutes)

**Presentation on financial controls**

🕒 (15 minutes)

## Key points and information

### *Prepare the task sheet with the following problems (or use other examples):*

1. The auditor finds receipts that do not seem to be genuine and asks the coordinator to follow them up
2. A shop steward who conducts local activities reports that members are complaining about the per diem because it is higher in another area
3. An educator has noticed that the amount spent on accommodation and food is higher in one area for no specific reason and the budget is overspent

### Ask groups to identify:

- ▶ **What they would need to know to resolve the problem?**
- ▶ **How they would resolve the problem?**
- ▶ **How they would prevent it happening again?**

## Plan and exercises

### Small problem-solving group exercise

- ▶ Divide learners into small groups
- ▶ Hand out the task sheet

Ask the groups to return to the plenary.  
Ask each group to report back verbally.

Note the main points on the board and facilitate a discussion to compare the responses.

🕒 (40 minutes)

🕒 **TOTAL TIME: 90 minutes**



## SESSION SEVEN

### Evaluating a programme

 1½ Hours



#### Aim:

- ➔ To introduce educators to a framework for evaluating a programme of courses that can demonstrate the results of education for the union

#### Learning objectives: at the end of the session learners will be able to:

- ➔ Explain the difference between monitoring and evaluation
- ➔ Describe what and how to evaluate
- ➔ Discuss how to analyse and use the information obtained

#### Materials:

- Flip chart, board and markers
- Hand-outs Nos 18 and 24

#### Prepare:

(1) presentation with visual aids from Hand-out No. 24; three flip charts, each with a different heading

## Key points and information

### Flip chart headings

I like doing evaluation - - - -

I find evaluation difficult - - - -

Evaluation does not motivate me - - - -

Place the flip charts on the wall in different places.

In the presentation cover:

- ▶ The difference between monitoring and evaluation
- ▶ What and who are evaluated
- ▶ The levels of evaluation
- ▶ How to evaluate

Give out Hand-outs Nos 18 and 24.  
Write exercise on the board.

***Ask groups to prepare their reports on A4 paper and photocopy them to give out to the other learners.***

## Plan and exercises

### Short introductory exercise

- ▶ Read out the headings and ask people to go to the one that they feel most strongly about
- ▶ Ask each group to share why they chose that heading and what causes this feeling
- ▶ Bring the groups into a circle to share the responses
- ▶ Note the responses on the board

Summarize by saying that a better understanding of evaluation can make it easier.

🕒 (20 minutes)

### Presentation on evaluation

Ask questions to assist learners to contribute their experience and give and ask for examples.

🕒 (20 minutes)

### Small group exercise in programme design

- ▶ Design an evaluation process to identify the behaviour and organizational evaluation levels
- ▶ Explain how the information will be gathered
- ▶ Describe the methods used and the procedures
- ▶ Explain how the information will be used by the union

Facilitate verbal reporting back.

🕒 (50 minutes)

🕒 **TOTAL TIME: 90 minutes**





# HAND-OUT 19

## Union education policy

### THIS HAND-OUT DISCUSSES:

- ▶ The purpose of an education policy
- ▶ The development of the policy
- ▶ Implementation and resources

*This hand-out should be read in conjunction with the introduction to the Handbook, 'Introducing union education'.*

### The first step in planning an education programme.

## ■ The purpose of an education policy

Unions, through democratic decision-making structures, develop policy for a range of subjects, such as gender equality and sectoral issues.

Policies hold the union accountable to the membership. They guide the work of the union and provide a framework for day-to-day decisions and actions.

An education policy is not developed in isolation, but takes into account other union policies and strategic action plans.

*All unions are different, so there is no standard text for an education policy, only guiding principles*

**The International Labour Organization (ILO)** has promoted workers' education since its inception in 1919, when a policy was developed to support the establishment of an international workers' university. This was finally achieved with the setting up of the Global Labour University in 2004.

Initially, the ILO's education policy and actions focused on materials and technical advisory missions, but in 1950 a resolution was adopted requesting that:

“ ‘appropriate measures should be taken to promote opportunities for workers to be educated and defined the purpose of workers' education as being 'to enable workers to participate more effectively in various workers movements and to fulfil more adequately their trade union and related functions'. ”

*(ILO, Workers' education and its techniques, Geneva 1976)*

The ILO's policies and resolutions have been updated regularly since then and have informed the work of ACTRAV over the years. They are implemented through the programmes of the ILO's International Training Centre in Turin and the ILO's regional structures and support for unions.

## ■ Developing the policy

### The process

A policy can be developed by an education committee or by nominated union officers with relevant experience in union education. They then have the responsibility to prepare a policy and submit it to a decision-making body of the union.

*A draft policy is presented to a decision-making body for endorsement*



### Step 1: The situational analysis

The first stage in developing a union education policy is to gather background and current information that identifies the external context, challenges and problems facing the union.

An education policy in an industrially developed country where unions have rights enshrined in law, but where economic policy is creating unemployment, has a different focus than in countries with a high level of workers in the informal economy who have no union rights.

### *Gathering the information*

1. For large unions, an external resource person or labour support organization can be contracted to carry out the study
2. A person/s can be nominated within the union who has the skills to carry out the required research
3. For smaller unions, a workshop can be held, with key leaders and representatives, to identify issues and challenges

*A situational analysis ensures that the education programme is based on reality and demonstrates why education is important*



**Questions concerning the external environment**

Area of research	Questions to ask
<p><b>The current political direction of the country</b></p>	<ul style="list-style-type: none"> <li>▶ How stable is the government and the country?</li> <li>▶ What is the level of corruption and what impact does this have on public services, unions and workers?</li> <li>▶ Are trade union rights supported, or are the rights of union activists and workers violated?</li> </ul>
<p><b>Labour and union rights</b></p>	<ul style="list-style-type: none"> <li>▶ If there are legal rights, how well are they enforced? Are there restrictions on organizing or collective bargaining?</li> <li>▶ Which ILO Conventions have been ratified? Is there a process of social dialogue?</li> <li>▶ Is there a Decent Work Country Programme and how was the national union centre included?</li> <li>▶ What are the gaps in labour legislation? Are there effective gender equality, equal opportunities and occupational health and safety laws?</li> </ul>
<p><b>Economic policy and direction</b></p>	<ul style="list-style-type: none"> <li>▶ What are the national development plans and do they involve unions? What impact do they have on the labour market and workers' rights?</li> <li>▶ What is the size of the informal economy and the balance between taxation and development aid?</li> <li>▶ Are wage levels at a reasonable level? How does wage bargaining take place and what is the role of the unions?</li> <li>▶ Are budgets for health, education and other public services adequate?</li> </ul>
<p><b>Social and cultural issues</b></p>	<ul style="list-style-type: none"> <li>▶ What is the economic situation of women workers?</li> <li>▶ What are the levels of sexual harassment and discrimination in society and the workplace?</li> <li>▶ What environmental policies and programmes does the government have?</li> <li>▶ What is the general level of education and the literacy rate?</li> <li>▶ Are there health related issues, such as HIV and AIDS, malaria or tuberculosis?</li> </ul>
<p><b>The general trade union movement</b></p>	<ul style="list-style-type: none"> <li>▶ The number of unions and national centres</li> <li>▶ Are there factional splits in the union movement and, if so, how do they impact on unions?</li> </ul>

**Labour support organizations**

- ▶ How are unions funded and which donors provide support?
- ▶ How often do the unions hold congresses and are they deemed democratic?
- ▶ What role do the national centres play in social dialogue?
- ▶ What type of education is provided by the national centres and other unions?
- ▶ What type of organizations are available and what do they offer the unions?
- ▶ What level of cooperation do the unions have with them?

**Defining union education**

After the situation analysis is completed, the next step is to develop a **definition of union education**, on the basis of which the vision or purpose of the policy is derived.

**The wording of a definition may indicate, for example, that it is:**

A mechanism or tool for strengthening union structures and actions

- ★ Supported by members and targeted at workers, members and officials
- ★ A long-term approach without a fixed end date that provides measurable results
- ★ Conducted within a political context that takes into account workers' rights, justice and equality
- ★ Based on the needs of members and workers in the sectors that the union organizes
- ★ Updated regularly to reflect the current external situation within which the union works

*The size and scope of an education programme depends on the availability of resources*

**Taking unions from being:**

**Reactive**

**to proactive**



**Responding**

**to influencing**

The definition informs the content of the policy, with headings that reflect the union's key needs and priorities.



## Step 2: The policy objectives

*The key questions to ask are:*

1. How does the union want the programme to support the improved representation of the members?
2. What are the key political rights and economic issues facing the union?
3. How will education activities be prioritized and what knowledge and skills will be developed?
4. Who will receive the education and how does the programme strengthen these target groups?
5. How will the programme be delivered and resourced?



## Step 3: The target groups

The policy needs to state who the main beneficiaries of education will be.

Are they shop stewards or workplace representatives, national leaders, women and young workers or members?



## Step 4: Gender equality

All policy documents should have a specific reference to gender equality issues.

These may include: the percentage of women and men learners and educators in the programme; statistics on participation; gender-sensitive materials; and how the issue is represented in programme activities.

**The results of these four steps are now formulated into policy objectives and outcomes.**

**For example: in the case of a union in a country that violates and denies trade union rights, has a high number of workers in the informal economy who are mainly women, and where union dues are difficult to collect**

*The policy objectives might be:*

- ✳ To make the union more visible to members and workers through better access to education activities at the workplace level
- ✳ To strengthen the skills and knowledge of the leadership to campaign and negotiate for trade union rights and the ratification of ILO Conventions
- ✳ To provide skills and knowledge in support of action by elected officials to strengthen local and branch level structures
- ✳ To establish a system of dues collection and provide the local leadership with the skills to collect dues at the workplace level
- ✳ To provide finance officers with financial management skills that strengthen the financial viability of the union
- ✳ To provide education programmes for women activists to strengthen gender equality and equity policies and structures
- ✳ To develop the recruitment and communication skills of local officials to organize workers in the informal economy
- ✳ To strengthen skills and knowledge at all levels of the union to conduct public campaigns that raise awareness of worker and trade union exploitation

## Implementation and resources

An education programme needs a structure, space and equipment, and a commitment from the union to provide human and financial resources.

*The policy document describes:*

- ➔ The structure for implementing the programme and a person or committee to coordinate the programme, who reports to the executive committee
- ➔ The number and type of educators and whether they will be appointed staff members, volunteer activists or elected officers
- ➔ The administrative resources and support for the programme
- ➔ The approximate percentage of the membership, by gender, who will attend the programme
- ➔ The source of funding and accountability systems

- ➔ Leave arrangements for members to attend education activities
- ➔ How the programme will be evaluated

*For the above example*

**The policy recommends that:**

- ✳ The education programme is funded from a percentage of union dues and funding applications to sponsor organizations
- ✳ An education committee with representatives from all levels of the union with experience in education coordinates the programme and is accountable to the executive committee
- ✳ Selected shop stewards and branch officials receive training as educators and are responsible for implementing the programme at the workplace and local levels
- ✳ All education programmes have at least 40 per cent representation of women, and a selection of skills and knowledge courses are held specifically for women activists
- ✳ There are processes to ensure that young workers and migrant workers have access to the programme and are encouraged to attend
- ✳ Statistics on gender representation are included in all activity reports
- ✳ The programme is supported by one administrative staff member, with additional support organized when necessary
- ✳ Separate quarterly financial reports are sent to the executive committee
- ✳ An annual evaluation review is presented to the annual general meeting





# HAND-OUT 20

## Training needs analysis

HAND-OUTS

### THIS HAND-OUT DISCUSSES:

- ▶ The information to be gathered
- ▶ The process of gathering information

**The second step in planning an education programme.**

**The content and scope of the education programme** is informed by the information gained from the training needs analysis (TNA) and is based on the approved policy document.

The TNA focuses on the internal structures and needs of the union, and the knowledge, skills, attitudes and behaviour (KSAB) required by the position holders in the union. It provides direction for planning the programme.

### Information to be gathered

Area of research	The information needed
<b>The structure of the union</b>	<ul style="list-style-type: none"> <li>▶ The structure, organizational chart and decision-making processes</li> <li>▶ The size of membership, with gender disaggregation</li> <li>▶ The financial situation and assets, including donor funding</li> <li>▶ The sectors that the union organizes and where they are located (rural or urban areas)</li> <li>▶ The number and type of policies and action plans</li> <li>▶ The number and location of workplaces in each sector</li> </ul>
<b>The positions held in the union</b>	<ul style="list-style-type: none"> <li>▶ The names of the positions and the number of people holding those positions</li> <li>▶ The role, duties and tasks inherent in those positions</li> <li>▶ The KSAB needed to carry out those roles</li> </ul>

**The current education programme**

- ▶ The type of trade union education leave that is available to members
- ▶ The size of the programme
- ▶ The type of education activities implemented
- ▶ The number of learners (by gender, sector and position) participating in the programme
- ▶ The cost and the human and financial resources used for implementation
- ▶ Evaluation reports

**KSAB in the union**

- ▶ A review of the KSAB of current position holders compared with the KSAB needed

**The problems experienced by position holders**

- ▶ The conditions in which they perform their roles, levels of morale, how involved people are and what particular issues they have

Organizational needs >>> Training/Learning needs >>> People's needs

For example:

- ★ Shop stewards are expected to handle members' grievances or negotiate wage increases

***Do they have the KSAB to carry out these tasks effectively?***

- ★ The union is implementing an organizing campaign in a certain sector

***Do the people implementing the campaign have the KSAB to communicate with these workers?***

## ■ Gathering the information

The method selected for gathering information depends on the size of the union and the time, skills and resources available to carry out a TNA.

The information for these questions is available from internal union documents, such as the constitution, job descriptions, selection criteria and reports.

Time and resources are usually limited, so it is rarely possible or realistic to interview all position holders.

*All samples and groups need to have appropriate representation of gender, young people and the different sectors*



If the union has sufficient resources, it can engage a consultant, although a TNA can be carried out by the education coordinator and officers, provided they have the time and skills.

**Different ways of gathering information**

**Targeted interviews:** a sample is selected from each position and the the same questions are used for all interviewees.

**Focus groups;** these involve selecting samples from the different positions and holding small workshops to discuss the questions. These can be held for one position or a cross section of positions on a regional or local basis.

**Questionnaires:** these are designed and sent out to the target groups, with the information received being collated and analysed (drawing up questionnaires for research is a specific skill, so it may be necessary to engage someone to carry out this task).

**Informal discussions:** these use existing union forums, meetings or workplace visits to discuss training needs, asking the same questions used for the interviews or focus groups.

**Observation:** a process during which the person/s responsible for drawing up the TNA visit workplaces, meetings or negotiations to identify skills gaps.

**Secondary data:** these consist of information from existing documents, minutes of meetings, manuals, collective bargaining agreements and reports. Statistics can be analysed on the turnover of shop stewards, gender disaggregation or the success of collective negotiations.

**Using the information**



The findings and statistics from the TNA are compiled into a report with recommendations for the programme.

The education committee or a selected group of officers then discuss the outcomes and start the process of developing the programme.





# HAND-OUT 21

## Designing a union education programme

### THIS HAND-OUT DISCUSSES:

- ▶ Constraints to planning
- ▶ Formulating the plan

*This hand-out should be read in conjunction with course design hand-out No. 16.*

**The third step in planning an education programme.**

*Designing the programme without doing research and analysis means it may not meet the needs of the union or target the right people*

### Constraints on planning

Certain issues can place restrictions or limits on the design of a union education programme. Educators need to take the following into account in the planning process.

### Accountability

As noted in Hand-out No. 13(a) (Adult education theory), there are three parties to union education '**the union, the learners and the educator**'. Each party is accountable to the other two parties, which may at times cause tensions for educators, for example:

- ★ When the union leadership requests activities that the educator knows are not consistent with policy, the TNA or the methodology
- ★ When the educator can see a weakness in a structure or method of operation and might propose a learning activity to strengthen it, which may not be acceptable to the leadership

These issues should be dealt with openly in discussion with the relevant person. However, it is **the responsibility of educators to find a balance between requests by the leadership and the education policy and approach.**

## Union policy

Unions are democratic organizations which are accountable to their membership. There will be difficulties with implementation if the education programme is not consistent with overall union policy and direction.

During programme planning, a draft programme should be discussed with those responsible for the different policy areas and action plans before it is submitted for final approval.

*Education programmes must be seen to be integrated into all policy areas and action plans*

## Union finances

An education programme shares union funds with other programmes and operational costs. The educator needs to have access to the union's overall budget to be able to estimate what funds are available.

Education funds should be part of the general union budget, whether they come from union or donor funding. Submitting a detailed budget for approval with anticipated activities, materials and administrative costs demonstrates transparency and allows the union executive to make an informed decision.

*It is a waste of time designing a programme that cannot be adequately funded*

## Practical feasibility

When designing the programme, it is necessary to consider the need for each activity and whether its inclusion is realistic.

- \* Is there a venue that is suitable, available and affordable?
- \* Can the right equipment and resource persons be found?
- \* Are the learners able to get to the activity? What type of leave is available to them?

## Other constraints include:

- ➔ The timing of conferences, annual general meetings and wage bargaining
- ➔ Social, political and cultural factors, such as women's family responsibilities, elections or school/public holidays
- ➔ Geographical and climate conditions, including distance, availability of transport or rainy seasons

## Formulating the plan

### The strategy

The strategy is a narrative description of the education activities, the objectives they relate to and the order in which they take place within the time period of the programme (for example, one year).

*Those responsible for implementing the programme, including support staff, should be involved in the planning*

*Writing a short narrative explains the logic of the programme, including the where, when, why and how .*

*The strategy description includes the following:*

<p><b>The aim and objectives</b></p>	<ul style="list-style-type: none"> <li>▶ The aim: a broad vision statement taken from the policy document</li> <li>▶ The objectives: more specific than the policy objectives and phrased differently to learning objectives because they focus on the benefits to the union</li> <li>▶ The number of objectives must be realistic and achievable within the context of the time frame, the current needs of the union, the funding for the programme and the capacity of the union</li> </ul>
<p><b>The expected results or outcomes</b></p>	<ul style="list-style-type: none"> <li>▶ Describe what the programme will achieve for the union, or what will happen within the union as a result of the activities</li> <li>▶ They are related to the objectives</li> </ul>
<p><b>The target group</b></p>	<ul style="list-style-type: none"> <li>▶ These are the people in the union who attend the activities because they can influence the problems identified and have an impact on the outcomes</li> <li>▶ Each target group is listed with a description of how the KSAB meets their needs and those of the union</li> <li>▶ Each target group includes the numbers of learners (female and male) who attend courses or workshops, their positions and where they come from</li> </ul>
<p><b>Activities</b></p>	<ul style="list-style-type: none"> <li>▶ The number and type of activities that are selected to achieve the objectives (see Course design, Hand-out No. 14, page 4, for different types of activities that can be included)</li> <li>▶ A brief description is included for each activity, its objectives, the target group and number of learners</li> </ul>

## The plan

This is the timetable or work plan for the year. It can be displayed on one or two sheets in the form of a calendar so that the union executive can see exactly when activities are to take place.

**The different types of activities can be colour-coded for easy reference.** For example, educators' courses can be in blue, courses of shop stewards in red or collective bargaining courses in green.

The timetable can later be produced as a brochure to promote the programme and attract learners.

*The programme plan needs to have a logic, so that people can see how the activities fit together and when they will take place*

**Information accompanying the plan includes:**

<b>Resources</b>	Educators and resource persons, materials, administrative requirements, other services and any cost to the learner
<b>Implementation</b>	Who coordinates and delivers each activity, and the roles, responsibilities and reporting procedures that are referred to in the strategy
<b>Evaluation</b>	Activities for measuring impact need to be scheduled on the programme plan and budgeted (see also Hand-out No. 24, Evaluating a programme)

## Curriculum development

After the strategy and work plan have been approved, it is the role of the educator to develop the curriculum or course design for each of the education activities in the programme.

These do not have to be submitted for approval with the programme, and are usually part of the individual work plans of the different educators responsible for each activity.

## Submitting the programme for approval

The programme contains the following documents:

- The strategy
- The work plan and attachments
- The budget

*And any documents necessary to support the programme.*



## HAND-OUT 22

# Managing a union education programme

### THIS HAND-OUT DISCUSSES:

- ▶ Implementing a union education programme
- ▶ Reporting procedures
- ▶ Recruiting for the programme

An approved structure and processes for managing the union education programme ensure coordination and cooperation between an 'education team' (the 'team') and the different structures of the union.

The number of people involved in programme delivery depends on the size of the union and the programme.

*For example:*



The tasks and responsibilities or job descriptions are decided upon by the education committee and attached to the programme strategy.

In a small union the position holders may have other responsibilities in the union. If so, the division of responsibilities between positions should be clear.

## Implementing the programme

Implementation can be divided into three areas with the tasks shared between those with responsibilities within the programme or the team:

1. Administration
2. Financial management
3. Education

**Standard forms and letters provide consistency.**

**Written procedures assist efficiency and prevent misunderstandings.**

*Strong team work ensures an effective and efficient education programme*

*Procedures should cover:*

- \* Decision making
- \* When and how to communicate with learners and other union officers
- \* Selection of learners
- \* Who is responsible for contacting the various persons involved in a course
- \* Cancelling a course

## Administration

Efficient administration ensures that a course runs smoothly for the learners, records are kept and information is accessible to the union.

**This is the main responsibility of the support staff.**

*List of responsibilities*

- \* Developing and filing reports and registration forms
- \* Organizing invitations and the registration of learners
- \* Keeping records and managing information
- \* Arranging travel, accommodation and food, transport, venue hire and invitations for individual courses and activities
- \* Communicating with learners prior to the course
- \* Providing a communication link between learners and educators
- \* Handling enquiries and passing them on to the relevant person



## Coordination

The implementation and organization of programme activities needs to happen as described in the plan and timetable. Problems will need to be resolved and decisions made.

The programme must account for the total expenditure of the education budget and demonstrate how funds are spent and managed (see Hand-out No. 23 for more details).

**This is the main responsibility of the coordinator.**

### *List of responsibilities of the coordinator*

- \* Maintaining written procedures for accountability in cooperation with the finance department or officer
- \* Standardizing forms for financial and narrative reporting
- \* Monitoring the collection of information and checking for accuracy
- \* Gathering and checking information for auditing
- \* Managing external funding and reporting procedures
- \* Coordinating the implementation of activities
- \* Implementing selected activities
- \* Organizing and coordinating evaluation procedures
- \* Attendance at executive committee meetings and other union forums to report on progress

## Education delivery

This includes both the preparation and delivery of education activities, reporting and evaluation.

**This is the main role of the educator/s.**

### *List of responsibilities of educator/s*

- \* The preparation and updating of curriculum/course and session design
- \* Research into various topics and current union issues
- \* Liaising with the appropriate officers on specific issues, such as collective bargaining and labour laws
- \* Preparing materials, visual aids and maintaining equipment
- \* Finding suitably qualified resource persons or guest speakers
- \* Ensuring that the target group selection criteria are applied
- \* Working closely with the support staff
- \* Checking that learners have appropriate leave arrangements
- \* Delivering education activities
- \* Writing activity reports and following up evaluation
- \* Attending conferences and meetings to keep up to date on union policy and areas of work

## Reporting procedures

***Reports have a number of functions - they:***

- \* Provide information to the leadership of the union so that informed decisions can be made about the future
- \* Support the monitoring and evaluation of the programme and propose recommendations for improvements
- \* Are a resource for other people working in the programme or the union
- \* Give feedback to learners
- \* Provide a reference for the future

*Simple, standard reporting forms assist those writing and reading the reports*

## Narrative reports

**Course and activity reports** provide statistics of attendance by gender, an analysis of the curriculum and methods, feedback from the learners, notes about the suitability of the venue, resource persons and equipment and a description of how well the learning objectives were met. Any problems or difficulties are noted, with recommendations for future changes.

**Regular (as agreed) programme reports** provide a summary of activity reports for the union's executive meetings, noting progress or any problems that have arisen. The reports indicate whether the strategy and expenditure are consistent with the approved programme plan and contain recommendations for any changes that may need to be made.

*Clear and consistent reporting deadlines need to be followed up regularly and understood by all concerned*

**Annual or congress reports** provide an overall analysis of the programme, highlighting results and describing how the programme objectives are being met, with a description of how cost-effective the programme is for the union. Statistics show the total number of learners disaggregated by gender, sector, position holder or any other pertinent factors.

**Financial reports** include details of expenditure for each activity and a budget against expenditure analysis. The total expenditure and remaining balance or over-spend are recorded.

*If external funding is involved, separate reports will have to be prepared for the donor organization.*

## Recruiting for the programme

It is important to have good attendance at education activities. Time and funding need to be allocated for this purpose.

There may be three situations: (1) there is a lack of registrations; (2) those registered do not turn up; or (3) too many people are registered.

There may be a number of reasons for these situations and it is the responsibility of the team to understand these reasons and do everything possible to minimize them.

## The number of registrations

Causes	Solutions
<b>The notice period was too short</b>	<ul style="list-style-type: none"><li>▶ Send out a brochure to all levels of the union with the programme for the year at least two months before the activities commence</li></ul>
<b>Insufficient information was sent out about the course</b>	<ul style="list-style-type: none"><li>▶ Have a specific work plan for each course or activity</li><li>▶ Set dates for sending out the different types of information</li></ul>
<b>Misunderstandings about the course or activity</b>	<ul style="list-style-type: none"><li>▶ Make a list of all the information to be sent out for each course</li><li>▶ Ensure all instructions and information are clear and written for the language and literacy levels of the target group</li></ul>
<b>The wrong target group was identified</b>	<ul style="list-style-type: none"><li>▶ Clarify the selection criteria in the course description and follow up with the officers who nominate learners</li></ul>
<b>Communication breakdowns</b>	<ul style="list-style-type: none"><li>▶ Establish a process for communicating with potential learners and those responsible for them</li></ul>
<b>Women members or elected representatives may have concerns about gender equality issues</b>	<ul style="list-style-type: none"><li>▶ Prepare leaflets to advertize each course or activity separately and distribute them to the selected target group three to six months in advance</li><li>▶ Include a statement on gender equality and sexual harassment in the advertizing leaflets and promotional materials</li><li>▶ Follow up registration numbers and have an agreed maximum number</li><li>▶ Put in place a fair system for refusing nominations</li></ul>

## Registered learners not attending

Causes	Solutions
<b>No leave available</b>	<ul style="list-style-type: none"> <li>Send out registration forms with a deadline and follow up those that are late</li> </ul>
<b>Fear of losing their job</b>	<ul style="list-style-type: none"> <li>Develop a process of contacting each learner to find out if there are any problems</li> </ul>
<b>Work commitments e.g. shift work</b>	<ul style="list-style-type: none"> <li>Check the leave arrangements at each workplace</li> <li>Request a union officer to negotiate leave with the employer</li> </ul>
<b>Family or other priorities</b>	<ul style="list-style-type: none"> <li>Provide learners with reliable contact details and request them to keep the union informed if they are experiencing problems for attendance</li> </ul>
<b>Domestic or health problems</b>	<ul style="list-style-type: none"> <li>Provide transport and make sure that the learner will not suffer financially by attending</li> </ul>
<b>Financial constraints</b>	<ul style="list-style-type: none"> <li>Provide assurances that there are no tests or judgments made about ability</li> </ul>
<b>Fear of lack of knowledge</b>	<ul style="list-style-type: none"> <li>Find out literacy and language issues on the registration form and modify the course design and materials as necessary</li> </ul>
<b>Literacy or language difficulties</b>	
<b>No available transport</b>	

There will always be times when workshops or seminars are scheduled at the last minute. In such cases, bring in other people from the union to assist the support staff and educators to organize the activity.

## Designing promotional materials

Ensure that all information is included in the materials, such as dates, location and target groups, description of the activity, access to the registration form, name and details of the contact person, and indicate whether transport, accommodation and food are provided. Include the name and logo of the union.

Write the materials in clear and concise language, with a feature that attracts attention. Use colour where possible.

Send out materials in good time so that people can make the necessary family or work-related arrangements.

*Use the internet or texts to advertize activities, send out e-mails and links and follow up with phone calls or texts*





## HAND-OUT 23

# Budgeting and managing finances

### THIS HAND-OUT DISCUSSES:

- ▶ Preparing a programme budget
- ▶ Financial controls

Unions are independent democratic organizations within a national legal framework, which should afford them the right to organize workers and manage their own programmes and activities.

Financial independence is an essential component of union independence. Within a democratic framework, unions are accountable to their membership for the money they receive and spend. The union has a responsibility to manage its financial affairs in a transparent and efficient manner.

*The financial procedures for the education programme must be consistent with the union's procedures and discussed with the finance officer*

***The financial management of the education programme takes place within this system, and the financial reports are integrated into the overall union reporting system.***

### The three main areas of financial management are:

1. Budgeting
2. Recording
3. Reporting

*If the planned education budget is more than the amount allocated, the programme has to be reduced until it is consistent with the amount available*

## Preparing a programme budget

The budget needs to be a realistic expenditure plan for using the estimated funds available. These will come from union funds or a donor/sponsor organization, or a combination of both.

The union allocates a set amount for the programme and any donor contributions are estimated. The available amount guides the development of the programme and the budget.

The budget is prepared by the education committee and/or coordinator in cooperation with the finance officer or treasurer, after the first draft of an education programme has been developed.

## Content of a union education budget

The union education budget is divided into **implementation** (the total cost for each individual activity) and **administration costs**. These are then subdivided into budget lines.

Individual activity costs	Administration costs
<ul style="list-style-type: none"> <li>▶ Fees for resource persons</li> <li>▶ Wage reimbursements for learners</li> <li>▶ Education materials and office supplies</li> <li>▶ Hire of venue, equipment</li> <li>▶ Travel for educators, learners and resource persons</li> <li>▶ Accommodation and/or food for learners and educators</li> <li>▶ Miscellaneous costs, such as medical expenses for learners, unexpected cost increases or events</li> </ul>	<ul style="list-style-type: none"> <li>▶ Salaries or allowances for educator/s and support staff</li> <li>▶ Insurance</li> <li>▶ Professional fees, e.g. for auditors or technical assistants</li> <li>▶ Purchase and maintenance of assets, such as computers, printers and photocopiers, furniture, vehicles or buildings</li> <li>▶ Printing and preparation of promotional materials</li> <li>▶ Stationery</li> <li>▶ Communication, postage and internet costs</li> <li>▶ Travel not associated with an activity</li> </ul>

Budgets are only estimates, but need to be as realistic as possible. Research can provide information on the various costs and a database can be kept to monitor cost increases over the budget period.

*It is important to monitor the percentage split between administration and education activities.*

*The union executive needs to agree on this split (for example, 30/70 per cent), but administration should not exceed the cost of education activities.*

## Financial controls

### Procedures

Salary and allowance rates are determined by the executive committee and need to be consistent with the rates used in other areas of union work.

Standard rates need to be set and applied consistently for:

- ➔ **Resource persons or guest speakers**, if they are not already paid by their employer
- ➔ **Reimbursement of travel expenses or mileage**, especially if learners or educators travel using their own cars

*It is useful to develop a manual that describes all the procedures*



- ➔ **Reimbursement of food and accommodation costs**, when travelling to a venue or staying with friends or relatives
- ➔ **Per diem for learners and educators**, with clear indications of what it is for, such as whether meals are provided and incidental costs included

## Records

Financial records have to be kept for income and expenditure, in accordance with an agreed system that includes the following documentation:

- Receipts
- Vouchers
- Cash book
- Bank statements and reconciliations
- Petty cash records.

**Receipts and vouchers** show that the union’s education funds are spent for the agreed and authorized purpose.

Receipts indicate	Vouchers indicate
<ul style="list-style-type: none"> <li>▶ The goods or services supplied with the date</li> <li>▶ Who wrote the receipt</li> <li>▶ The name of the person who purchased the goods or services</li> <li>▶ A description of the goods or services</li> <li>▶ The cost of the goods or services</li> </ul>	<ul style="list-style-type: none"> <li>▶ The person who received the payment</li> <li>▶ The person who authorized the payment</li> <li>▶ The date the payment was authorized, made and received</li> <li>▶ The purpose of the payment</li> <li>▶ The amount paid</li> </ul>

A financial report has to be produced for each education activity after it has been conducted, and the actual expenditure is compared with the amount allocated in the budget.

These amounts are then entered into a financial accounting software package on a computer or an approved cash book.

## Monitoring expenditure against the budget

It is important to monitor expenditure against the budget on a regular basis. This can be done either on an Excel sheet or in an accounts book, and should be shown in a way that indicates when items are under or over-spent.

*It is better to monitor accounts and expenditure regularly, than to deal with problems at the end of the year*

***If there is:***

- ★ **Overspending**, it is necessary to reduce other selected budget items in compensation
- ★ **Underspending**, the money can be used for additional activities or returned to the union's general budget. (These are decisions that have to be made by the education or executive committee of the union)

Petty cash may be authorized by the education committee using a process that is consistent with the union's financial systems.

**Monitoring for problems**

The accounts and records of receipts and vouchers have to be checked regularly by the coordinator of the programme to ensure there are no irregularities. If there are, they need to be checked with the persons responsible.

Any problems should be reported immediately to the education committee and discussions held to resolve them as soon as possible.

**Reporting**

At the end of the financial year, the books are prepared for the union's auditor. If they are kept up to date on a regular basis, it is not difficult to have them ready on the agreed date.

The coordinator prepares a narrative analysis of expenditure, explaining any changes that have been made, how the funds have benefited the union and members and whether the activities have been cost-effective.



# HAND-OUT 24

## Evaluating the programme

### THIS HAND-OUT DISCUSSES:

- ▶ The purpose of evaluation and monitoring
  - ▶ The ‘what’ and ‘who’ of evaluation
  - ▶ How to evaluate a programme
- (It should be read in conjunction with Hand-out No. 18)*

Without evaluation and monitoring, there is no way of knowing whether the programme strategy and activities are being implemented as planned and are making a difference to the union.

Contracts with external funders make it mandatory to include evaluation and monitoring. Each funder has different approaches, but the principles are the same.

*Evaluation tells how successfully the programme objectives have been achieved*

### The purpose of evaluation and monitoring

- ➔ Monitoring is a component of the evaluation process and takes place throughout the implementation of the programme
- ➔ Evaluation takes place after each education activity and at planned times during and after the programme cycle

Evaluation	Monitoring
<ul style="list-style-type: none"> <li>▶ Assesses the value and impact of the strategy on the union</li> <li>▶ Measures achievements against objectives and outcomes</li> <li>▶ Reflects on internal and external changes that have occurred as a result of the education programme</li> <li>▶ Promotes the achievements of the education programme</li> <li>▶ Helps to make decisions for the future</li> </ul>	<ul style="list-style-type: none"> <li>▶ Checks that the implementation of activities is within the agreed time frame</li> <li>▶ Observes and deals with problems and changes during implementation</li> <li>▶ Regularly assesses the external situation</li> <li>▶ Listens to learners and the union and provides feedback to the education team</li> <li>▶ Keeps track of expenditure</li> <li>▶ Recommends changes for improvement</li> </ul>

## The 'what' and 'who' of evaluation

Evaluation is often a threatening process for both learners and educators, so it is important to explain that it is not about judging or criticizing individual behaviour and should focus on achievements and progress.

### *Participatory monitoring and evaluation*

When people are fearful of evaluation, it prevents them giving constructive feedback. It is important for all those involved in the programme to be able to participate meaningfully.

- ➔ **Monitoring** is carried out by those involved in managing and implementing the programme
- ➔ **Evaluation** can either be an internal process, or may use an external consultant who works with the education team, depending on the availability of funding.

*If people are involved in evaluation from the beginning, programme delivery improves*

### *A programme evaluation includes:*

- ✦ Identifying the **impact of a union activity**, such as campaigns or collective bargaining that have been covered by the education activities
- ✦ Improvements in **the operation of union structures and the implementation of policies** covered by the programme
- ✦ The **effectiveness of the education curriculum**, including methodology and exercises
- ✦ **Improvements in the work of individual learners** when carrying out union responsibilities
- ✦ **Improvements in union representation** following an education activity
- ✦ The **effectiveness and efficiency of the education team** and how they were supported by the union
- ✦ **Financial accountability** and use of funds
- ✦ **Changes to the external or internal union environment** that have caused problems of implementation or prevented results being achieved

*Evaluations look for achievements as well as difficulties*

**The capacity to evaluate and monitor depends on:**

- ➔ Clearly defined programme and course objectives
- ➔ Accessible narrative and financial reports on the activities and the approved budget
- ➔ A budgeted evaluation plan with clear terms of reference
- ➔ Key people within the education team or the union who are trained to carry out an evaluation, or the funding to engage an external consultant

**Levels of evaluation**

Evaluation can be classified into four levels; taking these into account assists in selecting who and what to evaluate.

*Evaluation of the reaction and learning level should never be the only form of evaluation*

**The reaction level**

This takes place **during and at the end of a course or an exercise**. It reveals feelings that may not always be related to learning. ***It cannot identify long-term change.***

**Purpose:** to improve the design of courses and exercises

**Methods:** questionnaires, plenary questions or group discussion

**The learning level**

This takes place during and at the end of exercises and tasks and provides information about changes in individual knowledge, skills and attitude

**Purpose:** to assess the effectiveness of the exercise and course design, the length of the exercise and any changes that may be needed

**Methods:** observation, questions and facilitated discussion

**The behaviour level**

This takes place **after the activity or programme** and measures how knowledge and skills are applied by individuals or groups in their usual tasks at the union or workplace.

**Purpose:** to measure the longer-term effects of the education activity on learners when performing tasks and taking responsibilities

**Methods:** interviews, meetings and discussion with learners and the people responsible for their work in the union or the workplace

## The organization level

This takes place **during union activities** and measures the impact of the education programme on the outcomes of the union's work.

**Purpose:** to measure long-term impact and changes in union action and policy implementation

**Methods:** surveys and research or focus groups and observation involving all people at all levels of the union

## How to evaluate a programme

Evaluation is an information-based process with three stages:

### *Planning*

- The evaluation process is decided upon during the planning phase of the programme. Evaluation activities are described in the strategy narrative and appear on the work plan.

### *Gathering data*

- An evaluation is like research and needs information if progress is to be analysed. There are a number of methods for collecting data which are planned as programme activities.

### *Analysing and using the data*

- The information collected can be described as narrative and statistics, which inform debate and discussion on outcomes, or can be used to compile reports and measure progress and challenges, or in support of future action.

### *Evaluation of course and education activities (see also Hand-out No. 18)*

- This involves the 'reaction and learning levels' of evaluation and is part of the overall process. Course evaluations have to be recorded so that they can inform the programme evaluation.

### *Programme evaluation*

- This involves the behavioural and organizational levels of evaluation and is carried out at the end of and during a programme cycle.

***There needs to be consistency between course and activity evaluation and programme level evaluation so that meaningful analysis can be undertaken.***

*Course and programme evaluation cannot be carried out in isolation from each other*

## Evaluation methods

A programme evaluation needs terms of reference that are prepared by the education committee and team in cooperation with union leadership and selected learners from the programme.

When the terms of reference have been approved, the evaluation methods are selected and a plan is developed. Selection depends on the scope and type of the evaluation.

Methods	Use
Observation of courses, meetings, workshops or a union activity or field visit	<p><b>Used for measuring outcomes</b></p> <ul style="list-style-type: none"> <li>Provides information on how something is being done or how useful it is to the union</li> </ul>
Interviews with individuals or groups	<p><b>Used for measuring objectives and outcomes</b></p> <ul style="list-style-type: none"> <li>Useful for finding out responses after an education activity when learners or the union have practiced what was learnt at the workplace or in the union</li> </ul>
Questionnaires, surveys of selected learners or target groups	<p><b>Used for measuring objectives and outcomes</b></p> <ul style="list-style-type: none"> <li>Can provide factual and narrative information to indicate how people have changed and what they have done since the activity was implemented</li> </ul>
Action based or document based research	<p><b>Used as data for evaluating outcomes</b></p> <ul style="list-style-type: none"> <li>Provides information on the outcome of specific programme objectives or issues</li> <li>Gives factual and qualitative information</li> <li>Is participatory and can include many people</li> </ul>
Reports of activities and actions	<p><b>Used mainly for compiling data and statistics</b></p> <ul style="list-style-type: none"> <li>Reports provide useful and factual information about the agenda, learners and content of the activity</li> </ul>
Workshops with specific or mixed target groups	<p><b>Used for evaluating objectives and long-term change</b></p> <ul style="list-style-type: none"> <li>Assist individuals and the union to analyse data with a view to identifying long-term changes</li> <li>Provide opportunities for debate and reflection</li> </ul>
Informal discussions with learners or union leaders	<p><b>Used for follow up after a course</b></p> <ul style="list-style-type: none"> <li>Can be carried out by phone or e-mail, or in meetings</li> <li>Useful for assessing progress in implementation and identifying problems</li> </ul>

## Evaluation procedures

All those involved in the programme are represented

- ✱ *Including women and young people or shop stewards who have taken part in the programme*

The plans and methods are clearly communicated to all those participating in the education programme

- ✱ *Questionnaires, surveys and other documents need to factor in language and literacy needs*

Sufficient time needs to be allocated for the evaluation so there is time for people to respond to questionnaires and for the collection and analysis of information

- ✱ *Identify members or learners living in rural areas or without access to internet*

Consistent terminology and formats are used throughout the evaluation

- ✱ *Technical words are defined and terms are used in the same context in all documents*

Procedures and plans are discussed and agreed by the education committee and team

- ✱ *The plan and methods are discussed and prepared collectively. If an external consultant is used, the terms of reference and all other forms and documents are discussed with the education committee and team before being submitted for approval*

Sufficient time is allocated for planning and organizing evaluation workshops, visits and missions

- ✱ *It is necessary to take into account leave arrangements for members or shop stewards, and child care*

## Analysing and using data

**The information can be used in a number of ways:**

- ➔ To inform debate and discussion within the union on future strategies and provide background information for external funding applications
- ➔ To complete reports and make recommendations for union decision-making bodies
- ➔ To promote successes and progress among the membership
- ➔ To support decisions for future union actions and fund-raising.

*The process should be kept as simple as possible to avoid workload and participation difficulties*





# TASK SHEET 1

## Designing a union education programme

### THIS TASK IS CARRIED OUT IN THREE PHASES AND PROVIDES THE OPPORTUNITY TO:

- ▶ Practice working through the steps of programme design in groups
- ▶ Work collectively in small groups throughout the course
- ▶ Apply the results of group work when returning to the union

### The task has three phases:

#### Phase 1: Drafting an education policy

- ➔ The groups create a profile of a union to use for the task and draft a definition of union education and an education policy

#### Phase 2: Drafting a training needs analysis (TNA)

- ➔ The groups identify positions and the knowledge, skills, attitude and behaviour (KSAB) needed for the policy objectives from Phase 1 and plan a TNA process

#### Phase 3: Planning an education programme

- ➔ The groups draft a programme strategy using the results of Phases 1 and 2, and write a description of the implementation strategy with a programme timetable

#### Reporting back

There is only one report back at the end of **Phase 3**, when each group makes a shared presentation integrating the three **phases**. The groups prepare a Power Point presentation and hand out the report to all learners.

*Hand-outs Nos 19, 20 and 21 are a reference and guide.*

#### *The educators will:*

- ➔ Be available during the preparation time for each phase to provide feedback and discuss the progress made
- ➔ Make available materials, equipment and technical assistance for the preparation of the final report



## TASK 1

# Drafting an education policy

### In your nominated groups:

*Create a small union that has similarities with the unions of all the group members.*

**1. Develop a profile of the union briefly describing, for example:**

- ➔ The structure and decision-making process, membership, sector, the literacy and education levels of the members, gender breakdown and geographical spread
- ➔ The external context, including the political situation, type of government, industrial relations situation, economy and any other relevant information
- ➔ The problems and challenges facing the union externally and internally

**2. Draft a union education definition for the union.**

**3. List what you would like to see included in a union education policy document.**

**4. Write the education policy objectives, including the target groups and issues.**

🕒 Preparation time: 1½ hours

*Use Hand-out No. 19 as a reference.*

The results of this phase of the task will inform Phases 2 and 3 of the exercise.

**There is no report back for Phase 1.**

Write up your responses on a computer for inclusion in the final presentations.

***The educator is available to answer questions and provide support, and will monitor the groups regularly.***



# TASK 1

## Drafting a training needs analysis

### In your nominated groups:

*Using the union that you created for Phase 1 and on the basis of the policy objectives:*

1. Explain how you will carry out the training needs analysis (TNA) and identify the target groups involved
2. List the positions in the union structure and write a brief description of each position, explaining the tasks and responsibilities
3. Identify the knowledge, skills, attitude and behaviour (KSAB) needed for each position and the problems experienced
4. Describe the KSAB gaps in the union for the target groups with reference to the policy objectives

🕒 Preparation time: 1½ hours

***Use Hand-out No. 20 as a reference.***

The results of this phase of the task draw on Phase 1 and inform Phase 3.

**There is no report back for Phase 2.**

Write up your responses on a computer for inclusion in the final presentation.

***The educator is available to answer questions and provide support, and will monitor the groups regularly.***



## TASK 1

# Planning an education programme

### In your nominated groups:

*Design a 12 month union education programme, taking into account the responses to Phases 1 and 2.*

*Decide on the:*

- ➔ **Type and length of courses and other activities**
- ➔ **Dates and locations**
- ➔ **Number of courses for the year**
- ➔ **Number of learners per course or activity**
- ➔ **The resource persons needed**

### Task

1. Summarise a programme strategy, including an aim and objectives, expected results or outcomes and target groups with a few words about the selected activities.
2. Outline the implementation structure, the education team and the human resources needed for the programme.
3. Design a timetable for the programme, demonstrating the logic of the sequencing of the activities.
4. Describe the KSAB and the issue or problem addressed by the activity.

***Use Hand-out No. 21 as a reference.***

🕒 Preparation time: 2 hours

### For the presentation:

- ➔ Prepare a Power Point presentation, including the responses to Phases 1 and 2 of the task
- ➔ Justify the educational value of the programme to the union
- ➔ Share the presentation among group members

Print a copy of your presentation to hand out to all learners.

***The educator is available to answer questions and provide support, and will monitor the groups regularly.***

**Feedback is given on whether:**

- The programme is consistent with the policy and the TNA
- The activities are relevant to the needs of the target groups
- The description of the strategy is suitable for the union
- Each activity is consistent with the programme objectives



# Part 3

## ADDITIONAL MATERIALS



**Section One.** Alternative course designs

**Section Two.** Ideas for exercises

**Section Three.** Further reading and sources







# > Part Three > contents

Additional materials



SECTION 1 - Alternative course designs .....	1
SECTION 2 - Ideas for exercises .....	9
SECTION 3 - Further reading and sources .....	16





## SECTION 1

### Alternative course designs

The following course designs provide further ideas for educators on how to adapt a course to the needs of the union and specific target groups.

Resources are scarce, and paid leave is not easy to obtain.

The Introduction, Part A, '**About the handbook**', describes the training modules, and its section on **Using the Handbook** (pp. 9 – 13) explains in detail how to design alternative courses, with two examples containing background information, an aim and learning objectives, and a course outline.

*The following six short courses illustrate how different parts of the Handbook can be selected for other officers and representatives in the union. Each session is 90 minutes long. All information sessions should include plenary exercises and discussion.*

#### DESIGNING WORKSHOPS, SEMINARS OR CONFERENCES

*One-day course for union officers responsible for planning union activities*

**Learning objectives: at the end of the course learners will be able to:**

- Discuss how approaches to union education can motivate activists
- Plan a workshop, seminar or conference with a logical design
- Use guest speakers to engage learners in discussion

**Materials:**

Hand-outs Nos 8, 9 and 17; Introduction, Parts B and C; the hand-out on the role of educators (attached, pp. 6 and 7 below).

Session 1	<b>Welcome and introductions</b> , workshop description and an ice breaker. Discussion groups on how the approach to union education can strengthen union actions (Introduction, Part B, pp. 2 and 4)
Session 2	<b>Designing and planning workshops, seminars and conferences</b> (Module Two, Session Six, adapted for the target group with Hand-outs Nos 8 and 17)
Session 3	<b>Task: Designing a workshop in groups</b> Each group selects a topic and target group and designs a workshop, followed by reporting back and review
Session 4	<b>Using guest speakers or film</b> (Module 1, Session 9, and Hand-out No. 9) <b>Task: Planning a guest speaker into the activity design.</b> Reporting back and review (see exercise in Part Three, Section 2, p. 3)

## WRITING AND CONDUCTING ROLE PLAYS

*Two-day course for educators conducting workshops and courses for shop stewards and other representatives.*

### Learning objectives: at the end of the course learners will be able to:

- Select a type of role play for a specific learning situation
- Plan and write role play exercises with a scenario and case study
- Write a role play task and scenario to develop problem-solving skills

### Materials:

Hand-outs Nos 5; 7(c), 11(a) and (b), 12, 14 and 16; task sheets from Module One, Session 11, and Module Two, Session 5.

The course needs two educators to monitor the tasks.

Day 1	
Session 1	<b>Welcome and introductions</b> , with an ice-breaker to identify the experience of the learners
Session 2	<b>Activists as learners</b> (Module One, Session 5, and Hand-out No. 5)
Sessions 3 and 4	<b>Using role play and case studies</b> (Module One, Session 11, and Hand-outs Nos 11(a) and (b))

**Day 2**

Session 5	<b>Writing and asking questions</b> (Module Two, Session 3, and Hand-outs Nos 7(c) and 14)
Sessions 6 and 7	<b>Problem solving with role play - Group Task &amp; Presentation</b> (Module Two, Session 16, and Hand-out No. 16)
Session 8	<b>Evaluating a session and exercise</b> (Module One, Session 12, and Hand-out No. 12)

**CONDUCTING ACTIVITIES USING PARTICIPATORY EXERCISES**

*Two-day course for educators or others who conduct and plan union activities*

**Learning objectives: at the end of the course learners will be able to:**

- Discuss the importance of communication skills when conducting sessions
- Use visual aids as a support to present information
- Plan and use active learning exercises in sessions and while providing information

**Materials:**

Hand-outs Nos 3, 4, 5, 7(a), (b) and (c); Module One, Task Sheets Nos 1 and 2 (amended for the target group).

This course needs two educators to monitor the tasks.

**Day 1**

Session 1	<b>Welcome and introductions</b> (Module One, Session 1) use an ice-breaker to discuss education and activism
Session 2	<b>Communicating with learners</b> (Module One, Session 3, Hand-out No. 3)
Session 3	<b>Using visual aids</b> (Module One, Session 4, adapted to 60 min, Hand-out No. 4) <b>Introducing the first task</b> (Module One, Task Sheet No. 1) and preparation
Session 4	<b>Preparation for first task</b> (30 min) Presentations in two groups, each with an educator (60 min)

**Day 2**

Session 5	<b>Activists as learners</b> (Module One, Session 5, Hand-out No. 5)
Session 6	<b>Planning and using active exercises</b> (Module One, Session 7, first part only, Hand-outs Nos 7(a), (b) and (c))
Sessions 7 and 8	<b>Task two, writing and conducting a 20 minute session</b> in twos or threes (Module One, Task Sheet No. 2) ⌚ Preparation time: one hour ⌚ Presentations: two hours, including plenary review with all learners

.....

## MANAGING AN EDUCATION PROGRAMME

*One-day workshop for education coordinators or committee members and support staff*

**Learning objectives: at the end of the course learners will be able to:**

- Discuss how an education programme is designed
- Select a structure relevant for a specific union
- Manage the financial processes for an education programme

### Materials:

Hand-outs Nos 21, 22 and 23

Session 1	<b>Welcome and introductions</b> (Module Three, Session 1)
Session 2	<b>Designing an education programme</b> (Module Three, Session 4, p. 1, Hand-out No. 21, write an exercise for managing constraints)
Session 3	<b>Managing a union education programme</b> (Module Three, Session 5, Hand-out No. 22)
Session 4	<b>Budgeting and managing finances</b> (Module Three, Session 6, Hand-out No. 23)

.....  
**EVALUATING UNION EDUCATION**

*One-day workshop for coordinators, educators and education committee members*

**Learning objectives: at the end of the course learners will be able to:**

- Discuss the relevance of learning objectives to evaluation
- Explain the different levels of evaluation
- Select methods for gathering and using information from an evaluation

**Materials:**

Hand-outs Nos 6(a) and (b), 12, 18 and 24; Task Sheet for Module One, Session 3.

Session 1	<b>Welcome and introductions</b> (Module Three, Session 7, using the introductory exercise as an ice-breaker)
Session 2	<b>Revising learning objectives</b> (Module One, Session 6, Hand-outs Nos 6(a) and (b), with modified exercises)
Session 3	<b>Evaluating a session and a course</b> (Module Two, Session 7, Hand-out No. 18, including a presentation from Hand-out No. 12, with modified task)
Session 4	<b>Evaluating a programme</b> (Module Three, Session 7, Hand-out No. 24, without first exercise, but with modified task)

.....  
**MAINSTREAMING GENDER EQUALITY INTO EDUCATION ACTIVITIES AND PROGRAMMES**

*One-day course for educators, educator coordinators and members of the women's committee*

**Learning objectives: at the end of the course learners will be able to:**

- Discuss definitions of gender equality and how they can be applied to education activities and sessions
- Write materials, exercises and tasks that use gender sensitive language and gender equality approaches
- Integrate gender equality into all aspects of an education programme

**Materials:**

Introduction, Section C, Hand-out No. 11(b): ILO Participatory gender audit (see Part 3, Section 1): board, flip chart, marker pens, tape and coloured cards

**Prepare:**

Three presentations with visual aids from Introduction, Section C: (1) 'Defining gender equality (p.3); (2) Gender sensitive materials (p.8); (3) Integrating gender equality. Write an exercise for Session 3.

This session plan is taken from Introduction, Section C, of the Handbook

Session 1	<p><b>Welcome and introductions</b> (Module One, Session 1)</p> <ul style="list-style-type: none"> <li>Use an ice-breaker exercise to find out people's experience of working on gender equality issues <i>using the points for discussion in Introduction, Section C, p.10</i></li> </ul>
Session 2	<p><b>Defining gender equality</b> (Introduction, Section C)</p> <ul style="list-style-type: none"> <li>Begin with <i>the exercise on p. 11</i> (30 min)</li> <li>Give the first presentation with a plenary discussion (20 min)</li> <li>Use the group work <i>exercise on p. 5</i> (40 min)</li> </ul>
Session 3	<p><b>Writing gender sensitive materials</b> (Introduction, Section C, and Hand-out No. 11(b))</p> <ul style="list-style-type: none"> <li>Give the second presentation (40 min)</li> <li>Give out the task sheet for writing a gender-sensitive exercise and Hand-out No. 11(b) - allow 30 min to do the task and 20 min for reporting back (50 min)</li> </ul>
Session 4	<p><b>Integrating gender equality into education</b> (Introduction, Section C, Hand-out No. 11(b) and the Hand-out on ILO participatory gender audits)</p> <ul style="list-style-type: none"> <li>Give the third presentation on integrating gender equality using plenary discussion on the different points, and ask learners what they currently do in their unions</li> <li>Set up a group work discussion on 'education activities for gender equality' (p.9), asking learners to discuss the points and list how they would deal with this issue in the union</li> </ul>



## Hand-out

### The role of educators in union education

Educators play a major role in helping learners feel a sense of ownership of the outcomes of the learning process. When they leave a course or workshop, learners need to believe that they have made their own decisions to change what they do or think about issues and values.

Learners need a safe environment to analyse situations, share ideas and experiences, and reach decisions about what to do next.

Intensive dialogue in plenary or in group work may produce tension and disagreements, especially in a group of activists who are experienced and may have strongly held points of view.

In this type of education, factual issues are only a small part of presenting information. In group work there are opportunities for discussion and debate where there are no right or wrong responses.

Negative criticism or any indication that participants are 'wrong' prevents them from participating constructively in plenary or group discussions. Judgemental feedback takes away ownership and undermines confidence.

#### In this situation, educators need:

- ➔ An open attitude to issues without forcing an ideology or point of view, while at the same time making their own political position clear
- ➔ Good communication skills and questioning techniques, with the ability to listen proactively, always allowing people to participate and acknowledging their contribution
- ➔ The skills to anticipate situations and adopt a flexible and inclusive approach to deal with them, ensuring people can play a role in solving a problem
- ➔ Experience in designing session outlines, tasks and exercises that use genuine participatory methods

#### Educators need to:

- ☒ Establish and demonstrate an environment of trust and treat all input from learners with respect, so that learners can express ideas and opinions safely
- ☒ Include people in decision making about the day-to-day situations in the workshop or course
- ☒ Allow time at the beginning of the workshop for learners to establish their own ground rules for behaviour and to get to know each other
- ☒ Prevent negative criticism, the imposition of opinions or domination by others, including by educators

- ☒ Monitor small group work and, if tensions are not being resolved, assist learners to resolve them without telling them what to do
- ☒ Use methods that help individuals to pool their ideas as a collective and ensure that all ideas are respected, even if they are not agreed with
- ☒ Be flexible with timing and be able to make a judgement about when to move the session or timetable on to the next stage, depending on how important a discussion or exercise is to the learners
- ☒ Summarize input from learners regularly and ensure that each exercise and session reaches a conclusion and that people leave with a sense of progress
- ☒ Provide clear instructions and the necessary information for learners to complete exercises and tasks, and check understanding regularly
- ☒ Provide feedback through the use of probing questions that encourage people to explore ideas, without imposing their own ideas
- ☒ Encourage learners to take over some facilitation when they feel comfortable with the methods



## SECTION 2

### Ideas for exercises

The session outlines and hand-outs in Modules One, Two and Three provide ideas for exercises that are relevant to the topic, session and course.

Exercises should always be adapted to suit a specific course, target group and topic.

***They are useful to:***

- \* Draw on experiences
- \* Solve problems
- \* Encourage debate and dialogue
- \* Provide information on issues with a participatory focus
- \* Allow learners to practice using new knowledge and skills
- \* Motivate and develop collective action

*The starting point for designing an exercise is always the learning objectives of the session*

All exercises need testing, as it is not easy to gain a feeling of how an exercise will work out until it has been conducted at least once.

Educators can ask themselves the questions and try out the tasks during the planning phase, but after using the exercise they should check that it meets its purpose, and amend it as necessary.

***Refer to Hand-outs Nos 7(a), (b) and (c), 11(a) and (b), 15 and 16 on how to write and use exercises.***

***The following ideas provide a brief summary explaining the purpose of exercises, how to use them and the time frame.***

*An educator needs to feel comfortable using an exercise, otherwise it becomes a distraction for the learners*



## Listening

### Multiple role plays

- Purpose:** To assist learners listen for separate elements of speech
- Useful for:** Interviewing people with grievances, and for negotiations or research
- Timing:** 90 minutes; the role play lasts 60 minutes and the plenary review 30 minutes
- ▶ Divide learners into groups of three and ask each group to number themselves 1, 2 and 3.
  - ▶ Ask individuals to select a topic that makes them feel angry or excited (2 minutes)
  - ▶ Explain that each person takes it in turn to speak on their topic, while one person listens for feelings and the other listens for facts (5 minutes)
  - ▶ The two listeners then give the speaker feedback on what they thought they heard, and the speaker responds on whether the feedback is accurate (10 minutes)
  - ▶ The exercise is then repeated so that each person can be the speaker
  - ▶ After each person has spoken and received feedback, the three group members discuss how they felt about the exercise and what they learnt from doing it (10 minutes)
  - ▶ Finally, the educator brings all the groups together, facilitates the groups to share their experiences and asks probing questions, such as: Was it easier to speak about/listen to facts or feelings? How did they feel about giving/taking feedback? (20 minutes)



## Working collectively

### Small group work

- Purpose:** To encourage learners to reflect on what is involved in 'working collectively'
- Useful for:** Sessions that focus on union ideology and values
- Timing:** 90 minutes; the role play lasts 60 minutes and the plenary review 30 minutes
- Ask individuals to:**
- ▶ Think about a situation in which they worked with a group of members/activists on an issue or action that they felt went well
  - ▶ Recall the details that made it a positive collective experience, such as: Who was involved? Where and when did it happen? What it was about, and how did people behave? How were the results achieved
  - ▶ Divide learners into groups of three or four, depending on the number of learners

**Ask each group to:**

- ▶ Take it in turns to share their experiences
- ▶ Discuss what made it a collective experience and make a list of the key points that are needed for genuine collective work
- ▶ Write each point on a separate card to paste on a designated wall or board

**Bring the groups together around the board or wall**

- ▶ Ask each group to share the information on their cards and paste them onto the board/wall
- ▶ Ask people to organize the cards and divide them into categories and priorities
- ▶ Facilitate a discussion on the different points raised and why working collectively is important in union work



**Using guest speakers or DVDs**

**Small group work for the 'Question and answer' session**

Usually in a question and answer session after a speech or presentation only a few people ask a question, and the questions are often repetitive, or are sometimes statements rather than questions.

**Purpose:** To practice phrasing and asking questions

**Useful for:** Courses, seminars and conferences

**Timing:** 90 minutes: 30 minutes for the speaker or DVD, 30 minutes for the group work and 30 minutes for the questions and answers

Divide people into small groups without moving them from their chairs.

**Ask them to:**

- ▶ Share their reactions to the speaker
- ▶ List the questions they would like to ask, avoiding statements
- ▶ Check for similarities and make a priority list of two or three questions
- ▶ Select a spokesperson to ask the question(s)

**In the plenary:**

- ▶ Give each group the opportunity to ask one question, but request them not to repeat questions that have already been raised
- ▶ If there is time after all the groups have asked a question, ask the groups if they have any other questions that have not been raised.

**Alternatively**

Request each group to ask one question, and request the speaker to read out the question before responding and link any similar questions together



## Protecting workplace rights

### Brainstorming exercises and small group work

- Purpose:** To link rights at the workplace with ILO Conventions Nos 87 and 98
- Useful for:** Introducing shop stewards or members to the need for legislation to protect rights
- Timing:** 90 minutes: brainstorming 10 min., small group work 30 min., plenary 50 mins.

Brainstorm all the needs of workers at the workplace and list them on the board.

**Divide people into groups of similar workplaces, sectors or countries and ask them to:**

- ▶ List needs that are met and those that are not met, and write them on a flip chart
- ▶ Create a vision of a workplace where all needs are met by drawing a diagram or picture to illustrate what it would be like
- ▶ Share their perfect workplaces in plenary

**In plenary:**

- ▶ Give a summary presentation on the rights covered in ILO Conventions Nos 87 and 98
- ▶ Refer to the illustrations of their workplaces to find out whether or not the Conventions are applied and what the basis is for these rights
- ▶ Discuss the reasons for this and the role of unions in strengthening legislation



## Solidarity bingo

### Ice-breaker exercise to use in the 'Welcome and introductions' session

- Purpose:** To assist learners to get to know each other
- Useful for:** Getting people to move around and have a chance to talk with everyone
- Timing:** 15 minutes

**Prepare a bingo card with 20 (5x5) squares** and write something different in each box, such as 'Sang a protest song in the last month'; 'Speaks more than one language'; 'Has moved house in the last year'; 'Has been a member of more than one union'; 'Has seen more than five movies this year'; 'Has brown eyes'; 'Smokes more than five cigarettes a day'. The statements need to be relevant to the target group.

*Hand out a bingo card to each person and ask them to move from their chairs to the front of the room.*

**Give the following instructions:**

- ▶ The aim is to get as many signatures as possible on each square of the bingo card. Approach people and invite them to sign one square
- ▶ Each person can only sign another person's card once
- ▶ Introduce yourself as you collect the signatures, but do not discuss the issues

After 10 minutes

Question people to find out how many of their boxes have signatures, until the person with the most signatures in a single box is identified

Identify a box and ask if anyone would like to say why they signed that box

Summarize by saying that we are all part of a union, but there are also differences and it is important to respect differences in union education.



## Rosa Parks

An action method exercise to change attitudes and behaviour about activism

**Purpose:** To identify how it feels to take a stand for rights and pay tribute to a famous activist

**Useful for:** Raising energy levels and motivating people to take action

**Timing:** 60 minutes

*Ask people to take their chairs inside the 'U' and form a circle*

Hand out the attached story and read it out

Divide people into groups of four or five and ask them to select a way of acting out the story, giving each member of the group a role

After each group has performed the story, ask them to explain how they chose what to perform, how they felt about performing it and how it felt taking such a stand against racial injustice

### The Rosa Parks story

It was late one evening in Montgomery, Alabama, when a seamstress named Rosa Parks stood at the bus stop. She looked to her left and saw a bus coming, so she waved her right hand and the bus stopped. Rosa climbed up the three steps of the bus, paid her fare and proceeded to walk down the aisle. She shaded her eyes and first looked to the left for a seat at the back of the bus. There was no seat. She turned to the right and looked for a seat in the back. There was no seat. She looked straight ahead and still there was no seat in the back of the bus. But right beside her there was a seat. It was vacant. It was also in the white section of the bus.

You see it was 1955 and there was racial segregation in Alabama.

Rosa had recently completed a course at the Highlander Centre, sponsored by her union.

Rosa tapped her chin while she decided what to do. She sat down in the seat. She crossed her arms in front of her and sat staring straight ahead. The bus driver told her to move to the back and to give her seat to a white passenger. Rosa just shook her head and refused to move. Passengers started shouting racial slurs. Rosa covered her ears and refused to move. Finally, they were approaching her stop,

where she would get off the bus. She reached up and rang the bell. She stood up and walked to the front of the bus. She walked down the three steps to the ground. She sat down on the bench at the bus stop and waited. The police came. They made her stand with her hands on the top of her head. They arrested her and jailed her. She sat on a chair in a cold cell.

This brave action sparked the civil rights movement.

Rosa Parks, Dr Martin Luther King, and others called for the Montgomery bus boycott. This resulted in African Americans like Rosa Parks walking great distances back and forth to work each day. For Rosa it was a long walk, so sometimes she walked very slowly. Sometimes she put out her thumb and hitched a ride.

Rosa Parks was fired from her job for her actions. She stood up for her rights that day. She stood up proud and tall for an end to racism, as well as for dignity and equality. Her actions were the catalyst for a new movement.

Rosa Parks continued the struggle. She marched in demonstrations for freedom. She sat at numerous lunch counters that refused to serve African Americans. She reached for the sky.

Sometimes Rosa felt that being in the movement was like walking in circles. Other times she felt it was like writing new rules on a huge blackboard. Sometimes it was like swimming with sharks. But all the while, Rosa felt that she was linking with people in an unbreakable chain for freedom.

By sitting in the white section of that bus, Rosa Parks made a better world for all of us.

Source: *Education for changing unions* (see Part 3, Section 3, p. 128)



## Lost in the bush

### Team-building exercise

**Purpose:** to assist people to reach consensus

**Useful for:** dealing with tensions or when groups are not working well together

**Timing:** 30 minutes

#### Instructions

- ▶ Hand out the survival questions sheet
- ▶ Ask individuals to prioritize the three possible solutions to each situation (5 min)
- ▶ Divide people into small groups, without moving them from their seats
- ▶ Ask the groups to share their individual priorities and try to reach consensus on one priority for each situation (15 min)
- ▶ Ask the groups to share their priorities and to indicate in how many situations they were able to reach consensus



- ▶ Facilitate a discussion to find why they were unable to reach consensus, or how they managed to reach consensus, and ways they could have done so differently
- ▶ Note the points on a flip chart for future reference

### Information sheet hand-out

**You are lost deep in the bush.**

- 1. There are lots of poisonous snakes around. The best way to avoid them is to?**
  - 1) Walk softly and quietly
  - 2) Travel at night
  - 3) Make as much noise with your feet as you can.
- 2. You are very hungry but don't recognize any of the plants. The best way of finding out whether plants are safe to eat is to?**
  - 1) Try anything you see birds eat
  - 2) Eat anything except plants with bright red berries
  - 3) Put a bit of plant on your bottom lip for 5 minutes. If it seems alright, try a small piece
- 3. It is a very hot day. You have about a litre of water with you. You should?**
  - 1) Ration the water – drink only a cupful a day
  - 2) Do not drink until you stop for the night, then drink what you need
  - 3) Drink as much as you think you need, when you need it
- 4. Your water is gone and you are thirsty. You come upon a dry creek bed. Your best chance of finding water is to?**
  - 1) Dig anywhere in the creek bed
  - 2) Dig up plant and tree roots near the bank
  - 3) Dig the creek bed at the outside of a bend
- 5. You have to cross a river that has a strong current, large rocks and some white water. After you have chosen your crossing spot, you should?**
  - 1) Leave your boots and pack on
  - 2) Take your boots and pack off
  - 3) Take off your pack but leave your boots on
- 6. When crossing the streams in waist-deep water with a strong current you should face?**
  - 1) Upstream
  - 2) Across the stream
  - 3) Down stream



## SECTION 3

### Further reading and sources

The Handbook has been influenced by the following authors and texts, which can be obtained on line or from bookshops and libraries. The list also suggests further reading for educators who are interested in finding out more about the theories and approaches to union or adult education.

#### International Labour Organization

**ILO**, *Human Resources Development Recommendation, 2004 (No. 195)*.

**ILO**. *A manual for gender audit facilitators: The participatory gender audit methodology*. (second edition, 2012) Bureau for Gender Equality.

**ILO**. 2007. "Strengthening the trade unions: The key role of labour education", in *Labour Education*, No. 146-147.

**ILO**. 2007. *Report of the International Workers' Symposium on the role of trade unions in workers' education: The key to trade union capacity building*, GB.301-STM-8-1.

**ILO**. 2007. *The role of trade unions in workers education: The key to trade union capacity building: Background paper*, ACTRAV.

**ILO**. 2001. Deferred examination of the Paid Educational Leave Recommendation, 1974 (No. 148), and the Termination of Employment Recommendation 1982 (No. 162), GB.280/LILS/WP/PRS/3.

**ILO**. 1996. "Trade unions and environmentally sustainable development", *Education and training*, Booklet 6, Workers' Education and Environment Project INT93/M12/NOR. ACTRAV.

**ILO**. 1995. *Report of the symposium on the role of workers education in the promotion of trade union rights*. (Geneva, 10-14 October 1994), GB.262/LILS/11.

**ILO**. 1991. *The role of workers' education in the promotion of trade union rights*, Working Paper No. 2. Meeting of Members of the Panel of Consultants on Workers' Education (Geneva, 23-27 September 1991), EDUC/MC/D.2.

**ILO**. 1983. *Workers' education and its techniques: A workers' education manual*.

**Spencer, B.** 2007. "Strengthening the trade unions: The key role of labour education", in *Labour Education*, No. 146-147.

## Other authors

- Adams, F.** (with Myles Horton) 1975. *Unearthing seeds of fire: The idea of Highlander* (John. F. Blair, North Carolina).
- Burke, B., Geronimo, J., Martin, D., Thomas, B. and C. Wall.** 2002. *Education for changing unions* (Between the Lines, Ontario).
- Freire, P.**, 1972. *Pedagogy of the oppressed* (Penguin, Harmondsworth).
- Gaw, B.** 1979. *Processing questions: An aid to completing the learning cycle*, Annual Handbook for Group Facilitators. Pfeiffer, W.J. and J. E. Jones (eds.) (San Diego, University Associates).
- Horton, M. and Freire, P.** 1990. *We make the road by walking: Conversations on education and social change* (Temple University Press, Philadelphia).
- Horton, M.** 1990. *The long haul: An autobiography* (Doubleday, New York)
- Kidd, J.R.** 1973. *How adults learn* (revised edition) (Association Press, Follett Publishing, Chicago).
- Lipson, B. and Hunt, M.** 2008. *Capacity building framework: A values-based programming guide* (INTRAC, Oxford).
- Newman, M.** 2006. *Teaching defiance: Stories and strategies for activist educators* (Jossey-Bass. San Francisco).
- . 1993. *The third contract: Theory and practice in trade union training* (Stewart Victor Publishing, Sydney).
- , 1994. *Defining the enemy: Adult education in social action*, (Stewart Victor Publishing, Sydney).
- Peters, J.M. and Bell, B.** 1987. "Horton of Highlander", in *Twentieth century thinkers in adult and continuing education*, Jarvis, P. (ed.) (Croom Helm, London), pp. 242-257.
- Tuckman, B.W.** 1965. "Developmental sequence in small groups", in *Psychological Bulletin*, 63(6), pp. 384-99.
- Vella, J.** 1980. *Learning to listen: A field guide to methods of adult nonformal education* (Centre for International Education, University of Massachusetts).
- . 1994. *Learning to listen, learning to teach: The power of dialogue in educating adults* (Jossey-Bass, San Francisco).
- . 2008. *On teaching and learning: Putting the principles and practices of dialogue education into action* (Jossey-Bass, San Francisco).

**Wallerstein, N.** 1987. "Problem-posing education: Freire's method of transformation", in *Freire for the classroom: A sourcebook for liberatory teaching*, Shor, I. (ed.) (Boynton/Cook, New Hampshire), pp. 33-44.

## Trade unions

**Global Union Federations Writing Team.** 2009. A User Friendly Projects Handbook for Trade Unionists (LO-TCO, FNV Mondiaal, LO Norway, LO-FTF and SASK)

**Australian Manufacturing Workers Union (AMWU).** 2013. SMWU Delegates Manual, AMWU Education Unit, education@amwu.asn.au

**Clement, D.** 2004. *Education reflection action; An IMF manual for union educators and activists* (International Metalworkers' Federation, Geneva)

**International Confederation of Free Trade Unions (ICFTU).** *Guidelines on planning and evaluation of trade union education.* 1991 (Brussels)

**International Trade Union Confederation.** 2007. *Action programme on achieving gender equality in trade unions.* (Brussels).

**Luck, J. and Evans, J.** 1996. *Training skills* (Trade Union Training Authority, Melbourne, Australia)

**Phillips, K.** 2008. *Achieving gender equality: A trade union manual*, (ITUC, Brussels)

**Ritchie A.** 2009. *Gender equality duty: A tool kit for trade union reps*  
[www.closesthegap.org.uk](http://www.closesthegap.org.uk)

## Websites and useful links

Dialogue education.  
[http://en.wikipedia.org/wiki/Dialogue\\_education](http://en.wikipedia.org/wiki/Dialogue_education)

Declaration on Human Rights Education and Training, 2011  
[http://www.hrea.org/index.php?doc\\_id=1808](http://www.hrea.org/index.php?doc_id=1808)

Diana Holland, ITUC, 2010 Congress  
<http://www.ituc-csi.org/ituc-congress-calls-for-gender>

Horton, M. 1981. Interview entitled 'Adventures of a radical hillbilly', (Bill Moyer's Journal WNET Television, NY)  
<http://vimeo.com/30650519>

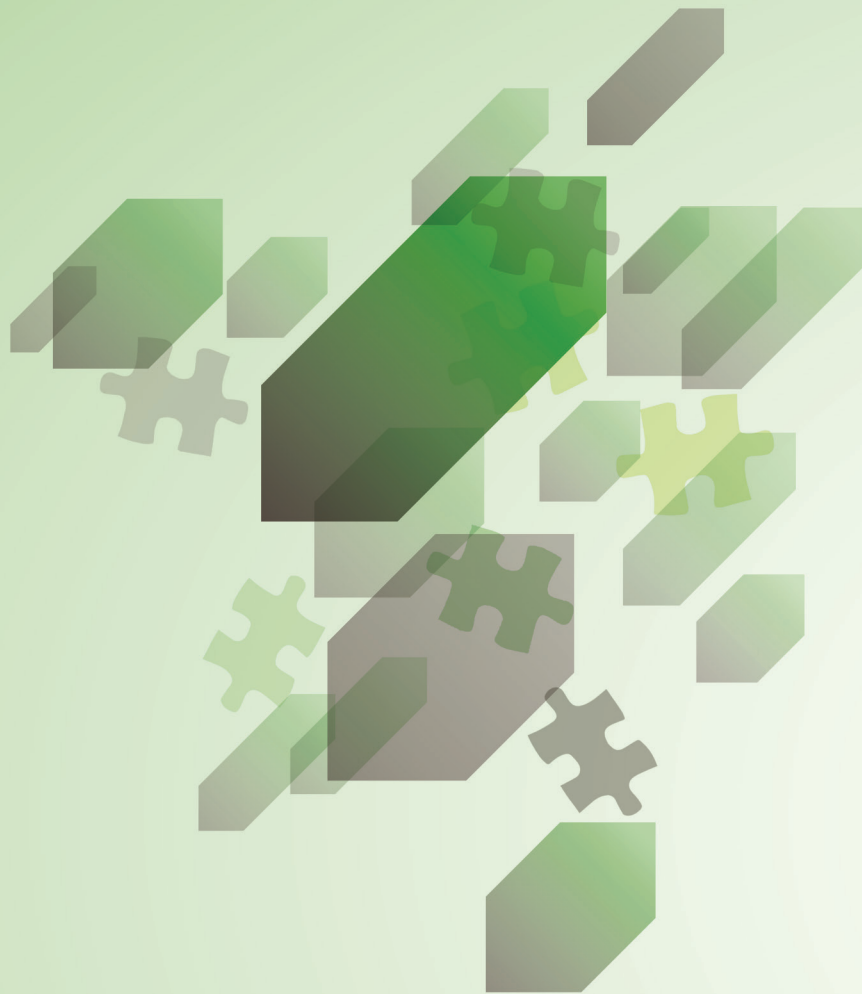
Newman, N.  
[www.michaelnewman.info](http://www.michaelnewman.info)

Olds, L. 2009. *The making of a popular educator: A memoir of my journey in adult education*, Section four: Popular education in the college classroom  
[http://www.popednews.org/downloads/pop\\_book\\_sect4.pdf](http://www.popednews.org/downloads/pop_book_sect4.pdf)


Smith, M.K. 2011. "What is praxis?" in *The encyclopaedia of informal education*  
<http://www.infed.org/biblio/b-praxis.htm>.

Vella, J. 2002. *12 Principles of effective adult learning*  
<http://www.massassets.org/massaves/documents/12PrinciplesAdultLearning.pdf>





Published with support from the  
**ACTRAV-ACFTU South-South  
Cooperation in the Asia-Pacific Region**

Made of paper awarded the European Union Eco-label,  reg.nr FI/11/1, supplied by UPM.

ISBN 978-92-2-129823-6



9 789221 298236