

**Educating Labour's Professionals**  
**La formation des permanents syndicaux**  
**Educando los profesionales del trabajo sindical**

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Article abstract

This study examines the nature of education and training for full-time union staff and officials in Canada and explores some of the factors that affect such provision. It was designed to complement similar studies of other countries and to contribute to more general discussions of labour education. The study compares the opportunities of training for Canadian union staff with similar provision in Britain and the U.S.A. and locates the discussion about further training within the contexts of existing programs of labour education and current debates about the revitalization of the labour movement. The study concludes with a call for more systematic discussion of these issues and analysis of different programmatic models.

# *Educating Labour's Professionals*

TOM NESBIT

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Unions occupy a pivotal position within the economies of most industrialized countries. Although the percentage of the workforce that is unionized is often far less than 50%, union involvement with the implementation of technical and social change in industry has a notable effect on society in general and, more specifically, on the working and social conditions of the population. Crucial to these developments are the cadre of full-time officials and staff who act as the union movement's key administrators, managers, and organizers. Due to an increase in union mergers, a reluctance to reduce personnel, and the rise in influence of staff unions, the level of full-time union officials and staff relative to the number

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of members appears to be rising—at least in Canada, Britain, and the U.S.A. (Clark et al. 1998). As unions grow in size and the issues they deal with become more complex, elected officials become full-time employees, services to members are expanded, and more officials and staff members are hired.<sup>1</sup>

The most extensive studies of their work (Clegg, Killick, and Adams 1961; Gray 1988; Kelly and Heery 1994; Mills 1948; Quagliari 1988; Robertson and Sams 1976; Watson 1988) indicate that union officials have an ever-widening range of responsibilities, which fall mainly into three broad functions: servicing and representing union members, organizing and recruiting new members, and representing and promoting the policies of the union. In addition, they are often expected to “provide the integrative and inspirational leadership which will harmonize the interests of ethnically and occupationally divergent members and build solidarity towards common goals” (Gray 1975: 472-473). Union officials are also expected to keep up with technological, economic and legislative changes. For example, recent developments in computer and office technology have necessitated changes in officials’ working practices. In addition, their work is often significantly affected by legislative changes and the transformations in industry and employment brought about by economic globalization (Borgers 1997; Brecher, Costello, and Smith 2000; Stirling and Miller 1998; Turner 1991). These changes have tended to aggravate an already excessive workload to the extent that many officials experience a significant amount of physical and emotional stress. As a recent study of Canadian union staff workload indicates, “many union representatives and office workers are at risk of burning out trying to meet heavy job demands” (Lowe 1998: 250).

Union officials have sometimes been described as the labour movement’s professionals, equivalent to professional workers in other spheres (Kelly and Heery 1994). As dominant definitions of professionalism usually depend upon the possession of unique forms of expertise and knowledge often acquired through formal education and training (Eraut 1994), one might expect labour organizations to have developed systems of training and professional development for their own officials and staff. However, as Gray’s study of training in the U.S.A. noted, “union leadership is perhaps the only major profession in the United States for which there is no established and recognized sequence of professional training” (Gray 1975: 472). Since then, this position appears to have remained unchanged. In 1991, Clark and Gray described the training of union officials as “an ad hoc,

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1. In 1991, Canadian unions employed almost 19,000 people (Clark, Gray, and Solomon 1996: 490).

unsystematic process at best” (1991: 191). Eaton (1995) found that many U.S. labour leaders predominantly acquired their leadership skills by the “sink or swim” approach. Further, Kelly and Heery’s (1994) study of British trade unions found only a few unions that “develop a strategic approach to training, in which there is an attempt to specify the objectives of training policy, identify officers’ training needs, and provide a system of release and cover for officers involved in training” (1994: 62). Although some steps have been recently taken in Britain and the U.S.A. to remedy this and provide a more systematic training system, most union officials appear “to learn by doing, without much help or encouragement from anyone, and without formal training” (Eaton 1995: 17). Consequently, this study explored to what extent this situation might be true in Canada and examined how Canadian union staff and officials are trained to do their work.

### ***RELATED LITERATURE***

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The forms and functions of labour education are well-documented (e.g., Dwyer 1977; Gray and Kornbluh 1990; Holford 1994; Hopkins 1985; London, Tarr, and Wilson 1990; Rogin and Rachlin 1968; Newman 1993; Spencer 1994; Taylor 2001). These studies variously discuss the general provision of labour education, its goals and approaches, and the various values and ideologies that support and underpin it. However, although crucial to an overall understanding of the role of education within labour movements, such studies rarely examine in any detail the different types of education provided for those at different levels within union organizations. Specifically, they do not deal with the education and training provided for unions’ full-time employees.

Indeed, studies of such training are generally hard to find. Although labour movements worldwide conduct extensive training for their members and officials and regularly monitor and evaluate their provision, reports are rarely published. As well, studies of training tend to be contained within broader discussions of union officials’ roles and functions. Only Olssen’s (1982) New Zealand study, the U.S. studies of Allen (1962), Gray (1975), Kerrison and Levine (1960), and Sexton (1966), and the British studies of Brown and Lawson (1972), Fisher and Holland (1990), and the Trades Union Congress (1972) specifically focus on the education and training of labour’s professionals.

Many of these studies consider the educational background and prior formal education of those who become union officials. Unlike other professions, trade union work does not require much in the way of formal academic requirements. As Fisher and Holland (1990) report, selection

criteria indicate that commitment to the union and a proven record of relevant industrial experience count far more than any formal or professional qualifications. Despite this, the formal educational attainment of union officials is increasing. In 1948 Mills identified that only 9% of union officials had any formal post-secondary educational qualifications. This figure then grew progressively to 20% in 1972 (Brown and Lawson), 44% in 1982 (Olssen), 62% in 1990 (Fisher and Holland), and 75% in 1994 (Kelly and Heery). While this increase can be partly explained by an improvement in educational standards generally, it also indicates that unions are increasingly expecting their officials to possess formal educational credentials. As one participant in a recent conference of international labour educators put it, "It'll soon be impossible to get a job as a union full-time official in Britain unless you've already got a degree."

Despite this, it appears that rather than receiving preparation for their job through formal education, most union officials still acquire the necessary expertise and attributes through some form of "lay apprenticeship." Studies indicate that, prior to appointment, full-time union officials have already served several years as lay activists acquiring negotiating and public-speaking skills as well as a detailed knowledge of the union's constitution, rules, and administrative procedures, and the relevant industrial consultative and bargaining machinery. However, although some unions require prospective officials to pass an examination, there is "no generally-accepted corpus of theoretical or practical knowledge, no standard training for entrants, and no professional qualification for trade union work" (Kelly and Heery 1994: 61). To address this issue, several alternatives exist. A brief review of the approaches adopted in Great Britain, the U.S.A., and Canada will highlight the various options available.<sup>2</sup>

### *Great Britain*

In Great Britain, many unions expect their officials, after appointment, to supplement their expertise with more formal training. For example, in 1991 a Trades Union Congress (TUC) survey showed that almost two-fifths of Britain's unions had sent at least 25% of their officers on training courses in the previous year and more than 50% in the previous five years. Much of this training was provided by the TUC itself via an extensive series of national and regional short courses (of between one and five days duration).

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2. These countries were chosen because, as Clark et al. (1998: 190) indicate, they "share a common language, have many historic connections, are relatively close geographically [and socially], increasingly deal with many of the same employers...and their labour movements have all been going through intense periods of self-examination and self-reflection."

Most recently, the TUC has been involved in the development of National Vocational Qualifications—occupational standards—for union full-time officials (Trades Union Congress 1993). In essence, these standards detail what officers need to know in order to carry out their job. Table 1 lays out these standards, subdividing them into “key areas” of work, “key roles,” and “units of competence.”

As can be seen from Table 1, the TUC regard the work of a union official as both varied and complex. It covers the recruitment and servicing of members as well as the ongoing management, promotion, and development of the union as an organization. In essence, this means that union officials are accountable to two masters—the members and the organization—which, at times, can produce conflicting demands and add to the levels of work-related stress.

As the TUC freely admits, these standards, although intended to be precise descriptions of expectations, cannot cover everything. They are neither intended to be read as a shopping list of tasks nor a list of priorities. For example, they only describe the outcomes or the intended results of activities rather than specify personal qualities or individual knowledge, skills, values, and attitudes. Also, they only describe outcomes which are the responsibility, or in the control, of individual officials; there may be many other complicating factors outside of individual control. Finally, because they can be regarded as little more than a set of competencies, the standards can appear to disregard or downplay the importance of key values or attitudes. The TUC acknowledges this last point and specifically lists a set of shared values—justice and fairness, equality and equity, democracy, and unity—that, for them, should inform all union activities and behaviour (1993: 6). The TUC intends its standards to “provide people with solid information about their jobs” so that they can then make more informed “assessment of their own training and personal development needs or they can be used in a more formal system of training needs analysis” (1993: 13). Their future use in labour education program development seems guaranteed particularly as the TUC is considering expanding the project to also cover lay and other voluntary officials. As the TUC puts it: “course designers and tutors can use the standards to construct training programs which have clear outcomes...for the tutor and...the person being trained” (1993: 13). Finally, although the standards and the associated National Vocational Qualifications (NVQ) have been endorsed by unions, what’s uncertain is the degree to which they have been accepted by union officials themselves. The TUC has published no results since their project started in 1993 and anecdotal evidence suggests that few officials have, as yet, bothered to catalogue the achievements necessary for the NVQ award of competence.

**TABLE 1**  
**Occupational Areas and Roles of Union Officials**

<i>Key Areas</i>	<i>Key Roles</i>	<i>Units of Competence</i>	
A Contribute to the maintenance and improvement of the organization and membership level of the union	A1 Maintain and increase the membership of the union	A11 Develop, organize and contribute to member recruitment	
		A12 Provide resources and support to representative and members for recruitment and retention purposes	
		A21 Plan, implement and coordinate workplace representative structures	
	A2 Develop and support local structures and workplace representatives	A22 Set up, implement and support participative structures and processes	
		A31 Provide information, advice and resources to support the education and training of members and representatives	
	A3 Support the active participation and education of members and representatives	A32 Organize and contribute to direct training activities	
	B Support and enable members to advance their individual and collective interests	B1 Negotiate and improve terms and conditions to meet an agreed collective bargaining agenda	B11 Gain and maintain recognition with employers
			B12 Contribute to the formulation and implementation of a collective bargaining strategy
B13 Contribute to the negotiation process			
B2 Support the representation of members' interests		B21 Support and assist in the representation of individual and collective interests	
		B22 Provide specialist advocacy services on behalf of members	
C Contribute to the effective management of union resources and the provision of member services	C1 Contribute to the effective administration of the union	C11 Seek, evaluate and organize information for action	
		C12 Exchange of information to solve problems and make decisions	
		C21 Recommend, monitor and control the use of resources	
		C22 Contribute to the selection and development of personnel	
	C2 Contribute to the effective resources management of the union	C23 Plan, allocate, and evaluate work carried out by teams, individuals and self	
		C24 Create and maintain effective working relationships	
		C31 Maintain and improve service operations	
		C32 Contribute to the implementation of change(s) in services and systems	
	C3 Contribute to the improvement of member services		
	D Promotion, support and represent the values and interests of the movement	D1 Promote and advance the policies and values of the union and the movement	D11 Implement and contribute to the policy making processes of the union
			D12 Support political activities within the policies of the union
D13 Promote equality of opportunity and treatment for all members			
D2 Promote the image, functions and purpose of the union		D21 Represent the union within local, national and international organizations	
		D22 Promote and provide information about the union and the movement	

### *U.S.A.*

The U.S. labour movement has long recognized the necessity of formal training for union leaders. In the 1920s and 1930s a number of residential schools were set up to train union activists; the most notable were Brookwood Labor College in New York, Highlander in Tennessee, and Bryn Mawr College in Pennsylvania (Clark and Gray 1991). Now, union officials who require training either attend their own union's residential centres (such as those established by the United Auto Workers in Michigan or the International Association of Machinists in Maryland) or go to labour studies programs arranged through a local college or university. The prevalence of this latter approach can be seen from its extent: currently over 50 post-secondary institutions in 30 states offer some form of labour studies program (University College and Labor Education Association 2000).

One of the longest running examples of this type is the Harvard University's Trade Union Program, which yearly provides an intensive 10-week program for approximately 30 experienced union officials and senior staff away from the day-to-day pressure of work (Bernard 1991). It is designed to help prepare senior union leaders for leadership by developing their analytical, managerial and problem-solving skills as well as discover ways to deepen public understanding of the value and importance of labour unions. Built around a core curriculum of five courses (strategic planning, labour history, union governance, economic analysis, and dispute resolution and arbitration), the Program examines contemporary challenges facing labour, analyzes the economic environment in which unions operate, and leads participants through the theory and practice of strategic planning. Most courses are taught by those Harvard faculty (or their invited guests) who are active in the labour movement as lawyers, economists, arbitrators, and consultants and regularly involve visits from local, national, and international union leaders, representatives from the media, political parties, and the business community.

Other universities have also partnered with labour organizations to develop related programs that also emphasize union leadership and administration—two of the more recent being the Leadership Institute co-sponsored by Cornell University and the New York State AFL-CIO, and the Union Leadership and Administration graduate degree in Labor Studies offered by the University of Massachusetts at Amherst. Designed in conjunction with the AFL/CIO's George Meany Center for Labor Studies, this latter program offers a three-year, part-time, limited-residency program designed to provide a "rich educational experience in an atmosphere of critical intellectual inquiry and solidarity" (Program brochure, available online at [www.umass.edu/lrrc/ula.html](http://www.umass.edu/lrrc/ula.html)). Courses are taught during ten-day residential sessions in January and July of each year and cover U.S. labour



history, collective bargaining and contract administration, labour legislation, research methods, and the role of unions in the economy.

Finally, the George Meany Center's National Labor College has, in addition to its year-round curriculum of short courses, recently developed a Bachelor of Arts program to better satisfy the educational needs of those trade union officers and staff who cannot be served by traditional educational institutions. This program enables union staff to pursue a degree while continuing their trade union work. The degree principally revolves around seven fields of study: labour studies, labour education, labour safety and health, labour history, labour organizational dynamics and growth, political economics of labour, and union leadership and administration, all of which enable students to relate their day-to-day activities in the trade union movement to general developments in the American economic, social, and political arenas. (Program description, available online at: [www.georgemeany.org/nationalnlc.html](http://www.georgemeany.org/nationalnlc.html)). The program incorporates several innovative features. First, recognizing the educational value of the union experiences that active officers and staff gain over the years, it provides academic credits for the learning which these experiences have generated. Second, the program also requires completion of a large component of liberal arts courses, which provide students with a broader perspective that reach into the social sciences, humanities, and sciences. Third, the program is based on a mix of residential and non-residential work. Week-long sessions are held at the College once every four months. Then, between sessions, students work independently on their courses—completing assignments, and conferring by mail and phone with instructors and other students. Finally, wherever possible, students are also encouraged to take, and can receive credit for, other elective academic courses at their home-based institutions.

### *Canada*

Unlike their American counterparts, Canadian unions usually eschew partnerships with universities and prefer to educate and train their own staff and officials—as, for example, at the Canadian Auto Workers' centre at Port Elgin, Ontario. However, the most extensive training provision occurs at the Canadian Labour Congress's five-week Residential Program delivered in two parts: a national four-week component at the Labour College of Canada plus an extra week in one of the CLC's regions. Consisting of five courses—economics, political science, sociology, history, and law, each with a specific focus on labour—the program aims “to develop leadership by increasing the ability of unionists to understand, analyse, and deal with everyday problems and issues that may confront them at work, in their unions, and in the community” (1999 Program brochure, 2).

In addition, several Canadian universities offer some form of a labour studies certificate or degree program. As necessary as these programs are to a more academic exploration of labour issues, practices, and organizations, they are not specifically intended for union officials and staff. Nevertheless, several recent collaborations have attempted to design specific educational programs specifically for labour's leadership. During the past five years, Simon Fraser University in British Columbia has run two successful nine-month certificate programs for senior provincial labour leaders. Designed in partnership with the Canadian Labour Congress' Pacific region and the BC Federation of Labour, the programs aimed to develop participants' theoretical understanding of a range of labour management issues while also broadening their knowledge and awareness of practical tools available for the efficient management and leadership of unions (Nesbit 1997). Like the U.S. programs, it is designed around certain core courses—leadership, economics, union administration, union as employer, and strategic management and planning—which address the specific needs of trade union leaders. A second collaboration occurs between Athabasca University in Alberta and the CLC's Labour College. They jointly offer a university-level distance learning course, which can be taken either by home study (correspondence) or online via the Internet. The course is designed as both a preparation for the residential program and a general introduction to the academic field of labour studies.

Finally, Québec's largest labour federation, the Fédération des travailleurs et travailleuses du Québec (FTQ) has recently formed its own educational initiative, the Collège FTQ-Fonds de Solidarité. Financially supported by the Solidarity Fund, a substantial labour-sponsored investment fund, the Collège provides an intensive educational program specifically for union staff and officials. Its main emphasis lies in "capacity-building:" influencing the social, economic, and political transformations already underway in Québec whilst also training the labour leaders of the future. The Collège's basic 7-week program is split into alternating blocs of residential and home-study that cover the economic, historical, social and futuristic perspectives on such issues as globalization and their impacts on union situations and practices. A second, parallel, component involves the development of such skills as writing, making presentations, interviewing, problem-solving, conducting interviews and surveys, understanding statistics, using computers, and conducting research. The design of Collège program is based largely on the needs of the participants and favours an integrated model of learning that respects individual concerns and talents. It poses problems rather than providing set answers and encourages participants to reflect on and challenge their own assumptions rather than simply confirming or reinforcing their existing beliefs.

### ***RESEARCH DESIGN AND METHODS***

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The research design was based on that of a similar study conducted in Britain (Fisher and Holland 1990) and considered four inter-related questions: What initial and continuing education and training exists for Canadian full-time labour staff and officials? What is the nature of such training? Who provides it? How is it evaluated?

Data was collected by a postal and telephone survey of Canadian unions and federations with more than 10,000 members (about 70 organizations) and semi-structured telephone or in-person interviews with 20 individual union officials or staff members in English-speaking Canada.<sup>3</sup> The intention of this design was not to provide an exhaustive survey but to seek clarification and insight into unions' approaches towards the training of their own staff and officials. Interviewees were selected on the basis of geographic and sectoral diversity of union, whether individuals worked in either a union's national or regional office, and their gender. Of the 20 respondents (10 men and 10 women), 12 were national officials and 8 regional. All had at least 8 years experience as a full-time official in the union movement. Interviews were tape-recorded and transcribed for later analysis. The complete data set was then coded and initial concepts and categories were linked into broader themes and patterns. Finally, drafts of the study's findings have been discussed at various meetings with union officials and gatherings of labour educators.

### ***FINDINGS***

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With respect to the specific research questions, the results of the survey were disappointing. No Canadian union reported that they had established any formal process for training of their paid officials and staff. This, they claimed, was a result of their hiring practices: as in most other countries, Canadian unions typically recruit their full-time staff from within. Local union officers or activists who have distinguished themselves at branch level or at conferences are more likely to be hired than those with little or no local experience. Advancement in the union then comes through junior officials moving to positions of more and more responsibility at regional and then national level. Not everyone follows this route however. From time to time, unions also require the services of more specialist staff—such as economists, educators, or researchers or those with media, health and safety, legal, or computer expertise. Here, unions are more likely to

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3. An extension of this study to include Quebec is currently underway.

step outside of their own ranks and recruit from those who have been more professionally- or academically-educated.

Whatever their function or career path, the majority of union officials enjoyed little formal education specifically designed to help them with their work. Although most unions in Canada provide a wealth of resources for shop steward and other lay official training, they were either reluctant or disinclined to offer much educational support towards those who had achieved permanent or full-time positions. As many unions expect their newly-appointed or elected fulltime officials have already undertaken significant lay official education and to be able to fully perform their jobs when hired, they consider extra training unnecessary. If resources permit, new officials are sometimes “teamed” with a more experienced official—perhaps one retiring from similar work—for several days or weeks. However, this practice was not widespread, perhaps because many union official jobs are elected and, therefore, contested. It would certainly be naïve to expect an outgoing official to then train someone who had just defeated her in an election. Where it existed, such teaming was most likely to occur for specific tasks—such as attending arbitration hearings—in which the new official has little experience and can benefit from watching, or partnering with, a more experienced colleague.

Many unions claimed to encourage new officials to attend the union’s own shop-steward courses as well as the local CLC-sponsored courses, labour studies programs offered at provincial colleges and universities and, occasionally, the four-week residential program of the Labour College of Canada. However, no union could provide overall details of how many of its officials had recently attended such courses; such record-keeping seemingly being a matter of local concern only. In addition, none of these programs are regarded as being specifically geared for the particular needs of full-time officials. On union-sponsored courses at least, such concerns are often downplayed in favour of the educational needs of lay representatives. “They’re the folks who need it most,” claimed a CLC staff member. “We expect the full-timers to either know the stuff already or catch up as best they can.” One additional aspect is that most union lay official courses are heavily focused on skills development rather than on developing a broader understanding of issues: “more job training than labour studies,” as one national representative put it.

Allied with a perceived inappropriateness in course emphasis came a reluctance to participate. Several of the officials interviewed indicated that they had little time or inclination for attending such programs and that their education was best advanced by attending local and national conferences. Indeed, several expressed surprise that any education specifically designed for them would be viable. Those officials who had taken part in formal

educational opportunities said that they were motivated more by an individual concern to better equip themselves than by any external pressure from their union. In any case, it remained an individual responsibility: union officials who identified a need for further education were generally expected to incorporate it into their existing work schedules.

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

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

Finally, as many union officers described, the key measure of all labour education—including that provided for officials and staff—is how far it strengthens labour organization. Hence, from this standpoint, one approach to labour's current crisis lies in strengthening unions' internal organizations through an expansion of its educational provision—for example, by developing such courses as organizing and collective bargaining with transnational corporations or examining transnational management techniques. Here, unions offered a wealth of suggestions about the types of courses they would like to see offered: language training, communication skills, or on current issues "such as globalization or the MAI [Multilateral Agreement on Investment]", courses for official's spouses and partners, dealing with unions as organizations, management skills ("how to manage

different bits of the organization...dealing with people, dealing with decisions, dealing with technology, that sort of stuff" as one female official put it), how to do research and write about it in a clear way, and using the internet as a research and advocacy tool.

### ***DISCUSSION AND IMPLICATIONS***

Clearly, there are problems associated with developing education and training in union organizations that are part organization, part social movement. Those who work full-time for unions are generally expected to subordinate their needs and interests to the demands of the membership that employs them. Despite this, however, several union leaders expressed grave concern about the lack of training provided for full-time staff. As the president of one of Canada's major unions put it:

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

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

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

There appear to be both personal and structural influences on the provision of education for union officials. One strong personal factor is the tension between identifying an individual need and the effort required to support a collective organization. "I'd feel so guilty taking time off," was one national official's comment. "I know I'd benefit from more training but the members' problems must come first." Also related is the often individual nature of a union official's work. As one experienced regional

official explained, "Much of my time is spent developing working relationships, whether with the members or with employers. That's my responsibility...and I can't just leave that or hand off my problems to someone else if I want to go on a course."

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

Several structural or organizational factors also affect the provision of education for union officials. The first, naturally, is a union's size. Briefly, small unions have far fewer resources in general and allocate much less towards labour education. As one woman regional organizer explained, "If you've got a region with only 12 officials and they're spread out across four provinces and two islands...freeing a couple of people up to go on a course is going to be quite difficult." The cost too can be prohibitive: "the amount of money we spend flying people around is enormous," explained one national education officer. Despite this, unions recognise the value of providing ample opportunities for officials to physically meet. "We've tried video-conferencing or cutting back on the number of meetings," said another official from the same union, "but nobody liked it. They said, 'This is our only opportunity for us to meet and get some important work done so don't go screwing it up by only holding it once a year.'"

A second factor involves a union's priorities. Often education has to take second place to a union's other functions such as organizing, servicing members, or negotiating contracts. Because these latter activities are generally the more visible aspects of a union's work (and hence, where members judge union effectiveness) they receive greater prominence. Significantly, few unions allocate any specific resources to, or have policies

on, employee training or appear to operate any system of performance appraisal—a common way of identifying training needs in an organization. “That’s one of the things I’d like to develop here,” said one national education officer, “but it has to work its way to the top of my priorities. There’s only so much we can do.”

A third and powerful influence might be best described as relating to a union’s organizational culture (Tuomisto 1993). As organizations central to the continuing struggle for social justice, dignity, and human rights, all unions hold democracy and tradition as core cultural attributes. Beneath those overarching features, however, each union’s culture is unique. Each has its own way of “doing things,” its own particular way of conveying its heritage through rituals, ceremonies, symbols, myths, stories, and physical artefacts. So, although unions differ enormously from each other in coverage, size, political colour, and structure, they have their own cultures—sets of assumptions, beliefs, and values about people, society, and organizational objectives, which link together with traditions of how people relate to, and interact with, one another.

For Australian labour educator Michael Newman, the existence of a general union culture that transcends individual differences becomes discernable when representatives from different unions gather together, as, for example, on union education courses. He also identifies several aspects of union culture that can influence educational concerns and attitudes. First, because the union is “owned” and “paid for” by its members, it is financially accountable to them. So, as participants in union education courses know that members’ dues are paying for their attendance they demand more obvious and immediate benefits from both the course and their instructors. A second factor lies in the concept of unity: “of being ‘us’ against ‘them’, of being unions against management, of being in a continual struggle to guard and promote the interests of ‘ordinary’ people like oneself” (Newman 1993: 17). This notion of unity encourages unionists to decide quickly who is for, and who against, them. Because conventional union education programs and courses are often specifically designed to challenge conventions and orthodoxies they may initially appear to be “anti-union” if they question union practices. Also, unionists used to defending themselves regularly against, often unfair charges, can quickly resent perceived misrepresentations.

Others have also explored the relationships between union culture and education. For example, in his powerful personal memoir, Canadian labour educator D’Arcy Martin (1995) speaks of the dynamics or “cross-currents” of union culture, which can help identify the supports and barriers for education that exist within unions themselves and the movement generally. One key dynamic—what Martin names the “oppressive/affirmative”—is



the presence in unions of inequalities and hierarchies of power. Women officials, for example, are often a significant presence at a local level yet are far less likely to hold a more senior or national post. When interviewed, one senior woman official described her first year as a national official, "It was dreadful...I was running around all over the country, never too sure of what I was doing or where I was going next. I never knew when I'd be home. I felt permanently exhausted. I know other women feel the same...there's got to be a better way of doing it than this." Other officials characterized how the selection of officials for further education can itself be political: "Sometimes, who the president chooses to send is quite contentious. If you're in favour, you get to go."

Another dynamic noted by Martin (1995)—"servicing/mobilizing"—is the ever-present need for unions to provide immediate practical help, while also creating a climate for broader social transformation. This dynamic is often dichotomized into "business" versus "social" unionism—and unions do tend to adopt one approach over the other. However, Martin's point is that, regardless of approach, such a tension is present in every union activity. Busy officials, ever responsive to the demands of the membership, can always find reasons not to make time for reflection or planning. Yet the opportunity to engage in these activities is precisely what many officials claim they value from education courses. As one senior official who had travelled widely put it, "My experience having looked at a variety of unions in a variety of countries is that the ones that take a more proactive approach to education and make time for more strategic planning are the ones that can best deal with the problems of globalization." For Olssen, these tensions regarding education can be related to "a conflict between the traditional aims of unionism as a reaction to unfair privilege and the need to adapt to a society where expertise and specialization are increasingly demanded" (1982: 45).

These dynamics highlight the role that unions can play in implementing a culture of learning at work—not least in their own working environments. As Tuomisto points out, "organizational learning is a prerequisite of cultural development" (1993: 2). He cites researchers of working life and education (e.g., Marsick 1987; Leymann and Kornbluh 1989) who are more or less in agreement about the kind of organizational culture that best promotes individual and organizational learning. Unions everywhere want their members to acquire and improve the skills, knowledge, and qualifications that enhance their employability and increase earnings, autonomy, and self-esteem. They regularly bargain over workplace training and develop training partnerships and strategies with employers and governments. For TUC policy official Sarah Perman, "unions have long recognized that...companies that invest in training and development are

best placed to deal with the challenges of new technology, global trade, and industrial change” (1998: 26). What better way for unions to underscore this recognition than by implementing training initiatives within their own organizations?

For example, training can help unions explore their own internal practices and how they might generate resentment and alienation. While discussing union culture, two senior women officials (from different unions) identified a discrepancy between labour’s progressive rhetoric and conservative practices. For them, this tendency was “rampant throughout the union movement” and could often be seen in their unions’ education programs which “privileged technical skills rather than fostered imagination or provided support.” Eaton’s (1995) study of women in trade union leadership also noted this tendency. She suggests that all women, especially minority women, request training programs more often than men. The CLC women’s committee has also set out a number of goals to tackle barriers to building an inclusive and progressive labour movement. Their report, based on a year-long study that examined the impact of economic restructuring on women’s work and lives, recommends that unions take up the challenge of, first, understanding what role their own structures play in reproducing systemic inequalities and, second, redressing internal disparities. So, as one of the recommendations states, “unions, as employers, should develop more pro-active staff training programs, employment equity plans, and lead by example” (CLC 1998: 2). The report quotes one long time union activist:

A critical analysis and discussion of power, self-interest, and decision-making must happen within our own organizations as well. This is essential for all of us—staff, leaders, and members. When organizational structures are hidden or not discussed, people are disempowered. When our own organizational structures are not easily understood, people learn that they have to be “in with the in crowd” to be involved in the union. This is one of the common ways that sexism, racism, and stagnation prevail in many organizations (Conrow 1991: 51).

This view highlights the often crucial role that women officials can play in transforming union culture. Gill Kirton and Geraldine Healey’s (1999) study of senior women officials in a major British union suggests that women’s responses to, and strategies towards, working in a predominantly patriarchal culture point to a dialectical relationship between women’s activism and union transformation. “Whilst union women informed by feminist values work towards transformative survival, the dual nature of their strategic orientations (as vanguard women and senior union officers) also contributes to satisfying the union imperative of status-quo survival” (1999: 44). As they conclude, “whilst union renewal does not rest on a transformation of the trade union’s patriarchal culture, it is likely

that where women are active agents, renewal and transformational effects will inter-relate" (1999: 44).

### ***CONCLUSION***

Trade unions have always been faced with the necessity of adjusting to economic, technological, labour market, legislative and public attitudinal changes. Yet, as the pace of change is making these concerns more acute, the demands to modify union structures and policies to address such challenges are also accelerating. Throughout the world, labour movements are deeply concerned over how, structurally, they might face the enormous challenges brought about by economic globalization and what they perceive as a concerted attack to threaten their viability, weaken their influence, and cut back workers' rights. In his speech to the 17<sup>th</sup> General Conference of the International Federation of Workers' Educational Associations, president Dan Gallin claimed that the labour movement is the target of a concerted, world-wide attack by employers and conservative governments with the objective of rolling back recent gains and drastically curtailing labour and other human rights (Gallin 1996).

However, as others have described, the crisis confronting the labour movement is not only rooted in globalization or the changing composition of the workforce but also in the way labour thinks through these challenges (Bélanger 1999; Mantsios 1998). For them, labour needs to redefine both its worldview and its organizational structures to accommodate not only the contemporary problems of globalization but also to better promote its core values of equality, participation, and democracy. In several countries discussion and resolution of these issues is seen as crucial for the revitalization of the labour movement—beginning to overcome what Leo Panitch has categorized as labour's "ideological stupor and organizational inertia" (2000: 371) and returning it to its role as a vibrant and inclusive social movement. Such a process necessarily involves encouraging unions once again to think ambitiously about transforming themselves more towards social unionism, shifting towards organizing rather than merely servicing, and increasing internal democracy (Moody 1997; Parker and Gruelle 1999)

Yet, unions do not always find it easy to take up these challenges or examine their administrative practices critically. Despite the presence of some remarkably thoughtful and far-sighted leaders in Canada's union movement, the pressures of such work allow little time for reflection or strategic analysis. In addition, the reactive nature of much of union activity combines with an inherent insularity and traditionalism to hinder much education or training that might challenge or question these tendencies. Of course, these can be seen as educational as much as organizational issues.

A recent ILO study of trade union confederations from eight industrialized countries considered the details of what adjustments unions are currently making or need to make to respond to current challenges. The report made a raft of suggestions, including, in the section on internal structures and strategies, one that specifically concerned the training of union staff. As the author indicated, "with few exceptions, the confederations acknowledged the need for formal training. As the needs of members becomes increasingly diverse and the issues with which union officials must concern themselves become increasingly complex, investing in training for union officials is becoming imperative" (Olney 1996: 81).

So, although the need for more training is acknowledged, the question still remains about what form it should take. A roundtable discussion at a recent labour education conference raised similar issues: What types of education do union staff and officials require and need? What are the most appropriate methods to impart the necessary knowledge, skills, and qualities? How might the efforts of the various providers of labour education be more closely aligned? For the 50 or so labour educators who crowded into a Boston conference room, the answers to these questions revolved around several key challenges. First, the recognition that the issue of staff and official training and leadership development is a concern for the whole labour movement. Second, the necessity of viewing such education as part of a continuum of lifelong learning. As one conference participant put it, "We don't need more one-off approaches to training. Union education should start with the rank and file, progress through steward training, and end...who knows where." In other words, the training for labour's professionals should build upon the existing strong tradition of union education for lay officials to better marry the different knowledge and practical skills required by fulltime staff, whilst also broadening their understanding and developing vision. A third consideration involved more practical details: should such education be necessarily linked to an academic qualification or some other form of certification? Should it be residential, utilize emerging technologies for distance and online learning, or a combination of various approaches? Should it involve open- or more targeted- enrollment? Is it better to union- or industry-specific or always involve people from different unions? To what extent should the curriculum be based around peoples' experiences? How much new information is too much? Is it prudent to explore and compare a variety of programmatic models?

Clearly, the roundtable discussion evinced plenty of concern about these issues and the discussants also described a range of local activities. On a more national level, several innovative approaches are already underway—witness the FTQ Collège, the academic programs linked to several North American universities, or the skills-oriented approach of the

British TUC courses. What is missing is systematic discussion of these issues or any analysis of the variety of approaches. An overarching concern is that not only must such a discussion continue but also that any resolution of these challenges must remain within labour movements themselves. "These issues came from the movement, so the answers must also come from the movement," as one union educator put it.

Unions possess an inherent dynamism that has ensured their continued survival through ever-changing times. One of their greatest assets lie in their personnel: the dedicated and hard-working staff and officials who perform the often mundane tasks of running the organization whilst also keeping its spirit alive. Clearly, the labour movement is not just sitting back waiting for change to occur. As current changes confront unions with problems and obstacles, they also show the way for new opportunities. Union leaders today act as much as administrators and analysts as they do as bargainers or spokespersons and, as such, require training and support for those roles. In 1970, a study claimed that leadership training was one of the principal challenges facing the U.S. union movement (Bok and Dunlop 1970). As the authors then stated, "society has already entered a world in which common sense and general intelligence are no longer sufficient to solve most problems facing large, complex organizations... Unions will find themselves at a disadvantage in dealing with organizations which have the needed information and trained talent" (1970: 469). Thirty years on, as the problems facing union leaders seem so much greater, so do the possibilities.

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## RÉSUMÉ

### **La formation des permanents syndicaux**

Les syndicats détiennent une position centrale au sein des économies de la plupart des pays industrialisés. Même si le pourcentage de la main-d'œuvre syndiquée demeure souvent en deçà de 50 %, l'implication syndicale dans la mise en œuvre de changements techniques et sociaux dans les milieux syndiqués a un impact remarquable sur la société dans son ensemble et, d'une façon plus particulière, sur les conditions de travail de la population. Le rôle des dirigeants syndicaux qui agissent à titre d'administrateurs, de gestionnaires et d'organisateur est donc crucial. Les études les plus poussées sur la nature de leur travail révèlent que les permanents syndicaux assument un éventail toujours plus large de responsabilités dans les domaines suivants : fournir des services aux membres et les représenter, recruter et organiser les nouveaux membres, faire connaître et promouvoir les politiques syndicales.

Les permanents syndicaux sont souvent perçus comme des professionnels du mouvement syndical, l'équivalent des professionnels qu'on retrouve dans d'autres secteurs d'activités. Les définitions dominantes du professionnalisme renvoient habituellement à la possession de formes uniques d'expertise et de connaissances, acquises la plupart du temps par le truchement d'une scolarité formelle ou d'une formation professionnelle spécifique. On peut alors s'attendre à ce que les syndicats aient développé des systèmes de formation et de développement professionnels pour leur propre effectif et leurs dirigeants. Cependant, comme le faisait remarquer une étude américaine, le leadership syndical est peut-être la seule profession



importante aux États-Unis pour laquelle on ne retrouve pas de formation professionnelle reconnue et établie (Gray 1975).

La présente étude cherche à vérifier la situation au Canada et à voir la façon dont on forme les dirigeants syndicaux et leur personnel pour effectuer leur travail. La conception de l'étude emprunte le cadre de référence d'une autre étude similaire effectuée en Grande-Bretagne en retenant quatre questions interreliées : Quel type de scolarité de base et de formation continue existe-il au Canada pour les permanents syndicaux à plein temps ? Quelle est la nature exacte de cette formation ? Qui fournit une telle formation ? Comment l'évalue-t-on ?

Les données ont été recueillies à l'aide d'un sondage téléphonique et postal au sein des syndicats et des fédérations comportant plus de 10 000 membres (ce qui implique environ 70 organisations) et à l'aide également d'entrevues semi-structurées auprès d'une vingtaine de permanents dans la partie anglophone du Canada. Le choix des entrevues s'est fait sur la base de la diversité géographique et sectorielle des syndicats et selon que les individus interviewés étaient affectés à un bureau national ou régional.

L'étude a révélé, à l'instar de ce qu'on retrouve dans d'autres pays, que les syndicats canadiens recrutent leurs permanents à plein temps à l'interne. Les permanents locaux ou les militants de la base, qui se sont fait connaître au niveau de la branche ou des conférences sont plus susceptibles d'être retenus que ceux qui possèdent peu ou pas d'expérience locale. La progression au sein d'un syndicat se fait dans le cas des permanents juniors aux passages de positions comportant de plus en plus de responsabilités aux niveaux régional et national. Cependant, ce n'est pas tous les individus concernés qui suivent ce cheminement. De temps à autre, les syndicats vont faire appel à un personnel plus spécialisé : des économistes, des éducateurs ou des chercheurs ou encore des personnes possédant une expertise avec les médias, en santé et sécurité, en droit et en informatique. Dans ces cas, les syndicats vont délaisser le recrutement à l'interne pour favoriser la venue de personnes plus scolarisées et formées dans leur domaine. Indépendamment de leur fonction ou de leur cheminement de carrière, la grande majorité des permanents syndicaux aime recevoir de la formation spécifiquement conçue pour les aider dans leur travail. Même si la plupart des syndicats canadiens fournissent en abondance des ressources affectées à la formation de délégués d'atelier et d'autres militants de la base, il n'en demeure pas moins qu'ils sont peu intéressés, voire même parfois réticents, à offrir un support éducatif à ceux qui ont accédé à des postes à plein temps ou de dirigeants.

Il semble que des influences à la fois structurelles et personnelles jouent sur l'offre de formation dans le cas des dirigeants syndicaux. Un facteur personnel dominant consiste dans l'identification d'un besoin individuel

au moment même où l'énergie de quelqu'un est fortement dirigée vers le support à fournir à une action collective. D'autres influences apparaissent également qui se caractérisent par des attitudes ambivalentes chez les permanents quant à la formation à fournir, par leur perception qu'une formation à la gestion des affaires syndicales puisse se révéler inappropriée ou trop théorique. Nombreux facteurs d'ordre structurel ou organisationnel affectent aussi l'offre d'une formation aux dirigeants syndicaux. Naturellement, un premier renvoie à la taille du syndicat : un syndicat de petite taille dispose en général de très peu de ressources et va par conséquent en allouer peu à la formation. Un deuxième facteur a trait aux priorités d'un syndicat. La formation passe après d'autres activités plus importantes, telles que les services à fournir, les efforts d'organisation et la négociation des conventions collectives. Puisque ces dernières possèdent plus de visibilité dans le travail effectué par un syndicat (les membres ayant tendance à les retenir pour juger de l'efficacité de leur syndicat), elles se voient donc attribuer une plus grande importance. Une troisième influence puissante est intimement associée à la culture organisationnelle d'un syndicat. La promotion de la justice sociale, de la dignité humaine, des droits humains sont des valeurs centrales et tous les syndicats considèrent la démocratie et la tradition comme un noyau d'attributs culturels ; cependant, au delà de ces caractéristiques englobantes, chaque syndicat nourrit une culture unique.

Cette étude met en évidence plusieurs éléments de la culture syndicale permettant d'identifier le support ou les barrières à une plus grande formation au sein des syndicats eux-mêmes et au sein du mouvement syndical en général. Ces éléments font également ressortir le rôle que peuvent jouer les syndicats dans la mise en œuvre d'une culture d'apprentissage au sein même de leurs milieux de travail. L'étude se termine par l'élaboration de suggestions pour les politiques et les pratiques syndicales et fait appel à la poursuite de la recherche sur ces enjeux.