

THE THIRD CONTRACT

Theory and practice in trade union training

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Introduction

From 1985 to 1989 I worked for the Australian Trade Union Training Authority (TUTA) in a team of trainers designing and conducting courses. Some of these courses were residential, some non residential, some open to members from any union, others for unionists from a single union, industry or enterprise. Some were for workplace representatives, others for full-time officials holding positions such as organiser, advocate, administrator, or trainer.

Before joining TUTA my experience had been in community and liberal adult education, and when I began working on the train-the-trainer courses I had referred to those fields. I got away with this for the first couple of courses but on the third, during a coffee break, one of the participants said to me loudly and clearly in front of the rest of the group: 'I came here to learn about union training, not adult education.'

Those of you who have tried teaching your peers will know the chill that sweeps over you when you are so publicly found wanting. The same criticism showed up in the course evaluation sheets. And shortly after, while I was working on another course, Phil Drew, Director of TUTA's residential Clyde Cameron College, said to me: 'That stuff on the adult learner is all right but can't you relate it more to workers and unionists?'

This book is my response. It is my attempt to examine the differences between trade union training and other forms of adult education and training, and to interpret some of the theorists from the worlds of adult education, community adult education, and human resource development in a way that makes their thinking and practice relevant to unionists.

I started from discussions and training sessions shared with Phil Drew. It was he who raised the idea that 'contracts' were important in union training, an idea that I have developed in Chapters 6 and 34, and which led to the title of the book. Both in relationship to my professional development and to this book I owe Phil far more than I can adequately express, although I must also say that our conversations have often been marked by major differences of opinion, so it is particularly important to state that I take sole responsibility for the final form in which any views in this book are expressed.

I shared ideas with different groups of union trainers, particularly during courses at Clyde Cameron College. Those formal training sessions and the discussions that followed them helped me validate certain ideas and review others. My thanks to all those course participants.

And in 1989 I took up a post in the School of Adult and Language Education at the University of Technology, Sydney, where I was given time to write the book I had in mind. My thanks therefore to the school and the university, and to colleagues Rosie Wickert, Jane Sampson, John McIntyre, Sue Knights, David Boud, Roger Morris, Mark Tennant and Griff Foley, all of whom read bits and pieces of the book in draft form.

Thanks also to Anita Devos, who offered comment and criticism on parts of the book; to Gerry Voll, who let me see his research into the background to TUTA; to Brian Cobb, Fran Hayes, Alan Healey, Kay Hathway and Steven Deutsch who read the full manuscript in draft form; and to Peter Kandlbinder who formatted the text in preparation for printing.

One final point: from time to time in the text I use the pronoun 'we', in effect including myself along with other union trainers. I do so because, although now working in another context, I have done some occasional training for TUTA and for one particular union and so still identify with union trainers as a group of colleagues and with union training as a profession. Indeed, such is the experience of training within the union context, that I doubt I shall ever lose that sense of identification, nor would ever want to.

Part One: Union Training

Chapter 1: In the Training Room

What do we mean by trade union training? What is taught? What methods are used? What are the participants like? What are the trainers like?

Negotiation

Rather than search for a definition, I want to start by describing how a union trainer might conduct a number of sessions dealing with negotiation. These sessions come from a course for workplace representatives run at the Sydney centre of the Australian Trade Union Training Authority (TUTA). Participants for this course are drawn from a number of unions and are variously described as job reps, site reps, office reps or shop stewards. The trainer? Well, I have worked alongside some trainers who were particularly skilled in conducting exercises in negotiation - Michael Costello, John Griffiths, Chilla Miller and Kaylene Chamberlain, to name four of my early mentors in union training. The trainer in this description might be any one of them.

The course is a four-day second-level course, meaning that the participants have already received some training in negotiation skills, and are reasonably seasoned workplace representatives. The trainer therefore normally starts this section of the course by conducting a session to draw out and pool the participants' experience.

The trainer might open the session by asking participants to work in pairs to build up a stockpile of real-life examples of negotiations in workplaces. There is likely to be lots of noise in the training room, and occasional bursts of laughter. The anecdotes, stories of success and one or two admissions of failure, are shared in plenary, and some of the theory reviewed and recorded on the whiteboard.

The trainer then runs a short trigger video showing a workplace representative in negotiation with a manager and asks the participants to work in groups of four or five to critique the rep's performance. The critiques are shared. Disagreements may emerge between the groups, and between individual participants. Some of these differences will come about because of different practices in unions and different responsibilities given by unions to their workplace representatives. Other differences might come about because of the different political colours of unions. The trainer may

let this discussion run for a few minutes in the belief that it is better to have any major differences put on the table.

In the final part of this session the trainer draws together the various critiques of the video and, with the help of the group, revises the steps involved in preparing for, engaging in, and following up a negotiation in the workplace. The trainer ends the session by announcing that the remaining three sessions of the day - four and a half hours in all - will be spent on a negotiation exercise. The group goes to coffee break, usually a little subdued. Role-plays and simulations can be a daunting prospect.

The exercise

Back from the coffee break, the trainer divides the group into two teams, and distributes the instruction sheets which carry the scenario for the exercise. One group will play management and the other the union representatives. The trainer explains that there will be a second exercise in two days' time and the roles will be reversed.

Immediately the mood changes. Even before all the instruction sheets are distributed people usually begin taking up positions. Half-jocular challenges are made. Half-cheerful insults traded. There is a sense of anticipation. It might be at this moment that the trainer chooses to lay down some ground rules. This exercise is to practise the skills and apply the theory examined in the last session. The teams can use any of the strategies identified and discussed but they are not to play silly buggers. No getting up during the negotiation and standing menacingly behind the other team, for example. No sudden unilateral changes to the scenario.

The teams go to separate syndicate rooms and are given an hour and a half to analyse the problems that have led to the dispute, prepare their cases, allocate roles to each of their team members, discuss strategies and attempt to anticipate the other team's case. The trainer keeps an eye on the groups but normally would not intervene beyond reminding them of the time.

Following another break, the two teams meet back in the main training room to conduct the negotiation. Often there is an awkward moment as they settle into position on opposite sides of the negotiating table. Once settled, they begin to negotiate. Including adjournments, the negotiation might take up to two hours to complete.

Normally the start is hesitant as each side tries to get the other side talking first, but as people become involved the pace quickens, tension builds and the exercise takes on a dynamic of its own. In almost any negotiation exercise there are moments

of frustration, disappointment, anger, excitement and elation. Under pressure, teams can come unstuck and begin arguing amongst themselves. Often when this happens they patch up their teamwork during an adjournment and come back into the negotiation with a new sense of purpose. Often all the time allocated for the exercise is needed and, when the trainer intervenes to announce that time is running out, the last few minutes are spent in a fury of bargaining. Usually some kind of agreement is achieved as a result of intense eyeball to eyeball negotiation right up to the deadline. When the exercise is over, people push back their chairs with relief, amazed at how involved they had become.

The review

Now the trainer has to debrief the group and the exercise.

The trainer asks the participants to move the tables and chairs back into the U shape they were using in the previous training sessions. Always there is noise and banter as they do this: laughter, recriminations, claims and counter claims of victory, admissions of blunders. Some participants remain standing, pointing, talking loudly over others. Gradually people resume their seats. By returning to the positions they occupied before the exercise, the teams are broken up. Now people are seated but still talking excitedly across the U, reliving parts of the exercise, making comments and asking questions like: 'Were you really going to close the place down?' 'We didn't know he had gambling debts.' 'Was that really your bottom line?'

The trainer lets the discussion run on, but begins to intervene to let the less raucous have a say. Gradually as the excitement dies down the trainer intervenes more, first to examine the process. Was the preparation sufficient? No, people will often say, we needed twice the time. With the wisdom of hindsight, can each team say they predicted what the other team's demands would be? Were they satisfied with the arguments they had prepared? Did they have demands, targets and bottom-lines all worked out? Did they organise their team before they went into the negotiation?

Now the actual negotiation itself. Were they able to get the other side talking, and were they able to listen? Did the negotiation pass through any stages? Here the trainer begins asserting more control by using the whiteboard to outline the stages many negotiations go through. Was there a stage when both teams stopped thumping the table and began seeking possible areas of cooperation? How did they

do this? Did they give anything away while they probed the other team? Which team moved into this final phase first? Was it to their advantage to do this?

Now to the substance of the negotiation. What was it all about? What were the two parties' common interests? What were their conflicting interests? Here the trainer might take control of the session and deliver a mini-lecture of four or five minutes. Both union and management have a common interest in production. Production means survival for both sides in the industrial relations scene. Both teams had a lot to lose if they could not reach agreement. But while unions and management may have a common interest in production, they have conflicting interests over the *share* of that production. The unions want their share in the form of increased wages, better working conditions, better super, less stress, more interesting work and a better social wage, while management wants to get hold of as much production as possible in the form of profit. Is that right? Is that kind of analysis too simple? Were those conflicting and common interests there in the negotiation exercise?

Finally the trainer addresses the question of the result.

Which team won? In response to this question both teams may vociferously claim victory. But, says the trainer, negotiation is not like a tennis match. There are no points and there is no umpire. If we become obsessed with scoring off the other side, we can easily lose sight of the substance of the negotiation. We might come out thinking we won only to realise that while we were scoring all the fancy points the other side had been quietly working away at getting what they really wanted.

So perhaps we should not evaluate a negotiation by asking who won. Perhaps we should ask: Did we solve the problem? After all, we came to the negotiation table because each side had a problem. Did each team effectively solve their particular problem? There can be some lively discussion in response to this with members of the same team not always in agreement. But, asks the trainer, if both sides set out to solve their problems, why could they not consult rather than negotiate?

Often the replies to this are: the danger is that we might get sidetracked and end up solving the boss's problems; or, why should we do management's work for them? Here there might be a discussion of those areas of common interest where consultation rather than negotiation may be possible, but the trainer must draw the session to a close and so asks again: what question should participants use to evaluate a negotiation? 'Did we win?' will not do. 'Did we solve our problem?' is all right but there are traps in it.

What the trainer is hoping to draw from the group and what, in any event, the trainer writes on the whiteboard in order to provoke the final moments of reflection is

a question crucial to the evaluation of any union activity: *Did we make a gain for our members?*

Chapter 2: The Trainers

The description of the sessions on negotiation is a composite one, based on my experience of observing and working alongside the four trainers mentioned at the outset of the previous chapter, and on having conducted these sessions myself. Here are descriptions of those four trainers, as I saw them working during my first couple of years in TUTA in the mid-eighties. Obviously each had her or his own style and particular emphasis, but despite the differences, each was quite clearly a *union* trainer.

Michael Costello's approach was more cerebral than most. He was concerned with getting participants to reflect, to analyse, to apply analytical models. He would stand reasonably immobile to one side of the top of the U, thoughtful, fixing participants with dark eyes, chewing on the beard along his bottom lip, making people think. 'Why would you say that?' he would say after pondering a participant's comment in silence for several seconds. Michael was university trained, had been an organiser with a union covering workers in the public sector and, after going into union training, had completed a graduate diploma in adult education. While with TUTA he oversaw the making of a number of training videos and was excellent at using video to develop discussion and stimulate a search for concepts. Michael has a forceful, natural authority. In his courses, he encouraged interaction but retained control and reserved his right as the trainer to have the final say. 'Do you have a problem?' he would ask quietly if a couple of participants were talking when they should have been listening.

John Griffith (Griffo) was a visual trainer, making inventive use of overhead transparencies, writing and drawing quickly but elaborately with different coloured pens on the whiteboard, revealing diagrams and drawings already prepared on large pieces of newsprint. He moved energetically, walking deep into the U to listen to one particular participant, then whipping around to throw a question at another. He gestured a lot, pulled faces, dressed flamboyantly, and was a little larger than life. 'Your body,' he once said to me, 'is still your best visual aid.' Watching him train was to watch a person happy in his work. I have seen Griffo in the process of drawing ideas out of a group, stop in the centre of the U and burst into delighted laughter. 'What's he laughing about?' one of the dourer participants asked me. With his flair for the visual - for making people see what he said - it was not surprising to learn that Griffo had been a printer and then an organiser for the printing union before becoming a trainer.

Griffo's emphasis was on skills, on teaching unionists to operate effectively in meetings, to negotiate, to speak effectively - and to listen. Debriefing a negotiation exercise, Griffo would get participants to relive the process. To do this he sometimes used video playback. 'Look at this again. Can you hear what they are really saying?' he asks. Sometimes Griffo would work in an apparently unstructured way. On one of the early occasions when I co-trained with Griffo we were walking into a training room together. Griffo was to lead the session and appeared to have no notes. 'What are you going to do?' I asked him. Griffo pulled out a card from his back pocket and showed me. It was covered with writing, arrows, and diagrams. 'That's what I want the whiteboard to look like at the end of the session,' he said. Griffo led the session, getting the participants to help him devise ideas, processes and guidelines. Items went up on the board, were considered and rejected. Others went up in their place. Arrows were drawn and then redrawn after vigorous debate. The session was lively and full of good humour, and was conducted by Griffo with every appearance of spontaneity. At the end of the session the board was almost exactly as Griffo had planned.

Chilla Miller's training was anarchic. One was never quite sure where one of his sessions would end up. He would go in with a clear area to cover or an exercise to run but such was his respect for his participants that he would often let them take control. He had no fear of tangents, and often seemed to follow rather than lead. Chilla moved *outside* the U. Often after he had set a discussion going, or uncomplainingly let one take over in the middle of a set-piece presentation, he would drift away from the front of the room. Participants would be arguing with one another and gradually register that the trainer was no longer there, but somewhere at the back of the training room, looking dolefully out a window or examining the wall. These could be magic moments. The discussion would falter. I have even heard a participant ask anxiously: 'What are you doing over there, Chilla?' Then, with no figure of authority, no focus in front of the U, the discussion would pick up again, but at another level of intensity altogether. Chilla could remain withdrawn for an agonisingly long time, but at some stage he would make a remark and walk purposefully around the outside of the U to the whiteboard or to a folder of overhead transparencies he had left on a table in front of the group. Chilla's re-entry into the arena would have a dramatic effect on the participants. They listened, hard, as Chilla would deliver a short, powerful polemic, or analysis, or construct, or model, or set of guidelines, semi-improvised but backed up with diagrams drawn on the board or,

after Chilla had scabbled and muttered his way through his folder and finally found it, a carefully prepared and printed overhead transparency.

Following Chilla in a tightly constructed course could have its problems. 'I didn't quite finish everything I had to say on formal meeting procedure,' he says as he comes out of the training room and you go in to conduct a session based on the assumption that he would indeed have covered the area fully. But Chilla's emphasis was on a politics based on a belief in equity, on an abhorrence of the misuse of power and on a faith in the ideals of unionism, and his training was aimed at raising this kind of generous political consciousness in all his participants. The timetable, the scheduled exercises came a distant second.

Chilla was an activist. Before joining TUTA he had been a job rep in a mail exchange where he had so vigorously represented the interests of his colleagues that he earned the epithet 'Red Charlie' in the Sydney press. At TUTA he was an innovator. He set up conferences and seminars on unions and technology, AIDS as an industrial issue, and new occupational health and safety issues; and he developed a course for Aboriginal unionists. Not surprisingly, Chilla had a loyal following of people who have been through his courses. I was in a bar with a number of union officials and Chilla's name came up. 'Chilla,' I exclaimed, and my tone of voice must have suggested that I was going to launch into an anecdote because an organiser from a left-wing union grabbed me by the arm and said quietly: 'Don't you say anything against Chilla Miller!'

Kaylene Chamberlain's concern was with establishing order and clarity. She had been a schoolteacher and later an organiser for The Australian Insurance Employees Union, then Actors Equity, before becoming a union trainer. Watching her draw out the significant points from a training film or debrief an exercise was a pleasure. The world of union affairs, of workplaces, of industrial relations is a complicated and confusing one. No two unions, no two workplaces are the same. No issues are identical. The skills needed are the complex, hard-to-define ones of consultation, negotiation, problem-solving and conflict resolution. Kaylene would show the film or run the exercise, then draw the mobile whiteboard close in to the top of the U and stand next to it, the fingers of one hand touching the edge of the last table on one side of the U, the marker pen held lightly in the other hand. 'What can we learn from all that?' she asks and turns and draws several columns on the board. Slowly, taking and recording the answers to her carefully structured questions, Kaylene would fill the columns until, with the group's help, the issues or the problems or the skills and techniques being examined were meticulously summarised. Kaylene has an

infectious laugh, which she used in her training to unite the group and to badger and cajole participants into giving her the responses she sought. Her sessions could be quiet and thoughtful but they were never dull. Clarity, order, a sense of community, and that acute, infectious good humour are an excellent formula for learning.

Chapter 3: Participants

There are over 3.1 million workers who are members of unions in Australia (ABS, 1993). Unions represent people in all kinds of work, trade, craft and profession. Unionists are people, so it might seem pointless to try to describe the participants in union training. And yet and yet, people who gather together in a union training course do seem to display a particular kind of spirit.

Perhaps the most extreme example I encountered of this was during a two-day course for about twenty job representatives of the Metropolitan Water and Sewerage Employees Union (Wages Division). The union, which has now amalgamated with another, covered people who laid and maintained the pipes and kept the water and sewage of Sydney moving. The course was held at the union's own premises in an improvised training room. I worked on the course along with the union Secretary and the union's research officer, and we covered the union's history, a little about the industrial relations system in general, a lot about the particular award covering their members, and sessions on problem-solving and formal meeting procedure.

The reps were friendly, cheerful, full of a sense of companionship. There was lots of talk before we started, lots of banter and laughter once the course was underway. The tone was set the moment the Secretary began introducing the course and introducing me. They all seemed to know him personally, or behaved as if they did. Very quickly he was interrupted by one of the participants. The matter raised by the participant appeared to have no relationship to the Secretary's introduction to the course but neither he nor anyone else seemed to mind. The Secretary dealt with the interjection and continued. He handed over to me to conduct the first session. I was accepted genially enough but certainly not with respectful silence. Participants felt absolutely free, as they had done with their Secretary, to interject, offer me advice, and weigh up what I was saying or doing against their own experience in a kind of running commentary. It was clear from their demeanour that this was *their* course, not the Secretary's and certainly not mine.

There were people who stood out. There was a large man, in his late forties I would say, articulate, completely bald, clad in black and wearing tall black leather boots. There was a young man, younger than most, who was unremarkable in appearance but was listened to hard and accorded a lot of respect. And there was one who sat silent, watching me attentively throughout the two days, but who did not say a word during any of the sessions. 'Are you having trouble understanding my English?' I asked him during a break. 'No,' he replied.

So we came to the last afternoon of the course and my session on formal meeting procedure. The session went reasonably smoothly for a while with interjections and unsolicited comments at a level I had come to accept as moderate. I used a video as the starting point for talking about the elements of a meeting and the factors we need to bear in mind to understand and control a meeting. Then the participants practised writing motions to put to a meeting, and finally we began an exercise in which we would work stage by stage through the formal procedure of putting a motion to a meeting, seconding it, debating it, amending it and voting on it.

My mistake may have been not to have used one of the motions written in the previous exercise. Instead I said: 'Let's assume that we have a motion that says: "That this meeting of members of the MWSEU condemns the action of management in moving the time clock from the gates of the site to the workshop doors and calls upon its -" '

'They wouldn't do a thing like that, Mike.'

'Wouldn't do what?'

'Not on our site.'

'Look, that doesn't matter. I'm just giving it as an example of a motion.'

'His example's no good.'

'Give him a go.'

'What's the point if it'd never happen?'

The debate continued on three levels: whether or not my choice of example was appropriate, whether or not the union would brook such behaviour by management, and whether or not I should be given a chance to continue with the session. I sat down for a while and waited until the matters were decided by consensus - in the way many workplace union meetings reach decisions anyway. The decision went my way, I was invited to continue and they let me take them through the stages of debating and voting on the motion with their usual good humour.

Chapter 4: Union Culture

People talk of 'the union movement' as if it were an entity. The media use the phrase 'union bosses' as if these bosses had command of a tightly unified set of organisations, and refer to 'the unions' as if the many and varied unions in Australia formed some kind of homogeneous whole. But as Ford and Plowman (1983) tell us, the union movement is heterogeneous. Unions differ enormously from each other in coverage, size, political colour, and structure. Unions with coverage in the metal industry, for example, have been split for years into two camps, one large union left wing in its political ideology, a group of other unions associated with the right of the labour movement. Some unions operate across the whole country, others exist only in one state. Some provide coverage for workers in a single industry; some cover members in a single enterprise; some are craft unions with members across a range of industries; and some cover workers engaged in different kinds of work in a number of different industries.

Some are centralised organisations whose field work is done by organisers appointed by an executive committee, and who delegate very little responsibility to their workplace representatives. Others elect their organisers and delegate considerable responsibility to their workplace representatives, including the right to negotiate details of enterprise level agreements and the right to call stoppages. Some have centralised, national structures, others federal structures. Some are big, with memberships of over a hundred thousand, staffs of research officers, industrial officers, accountants and administrative officers, their own superannuation funds, and property and investments worth millions. Others are small.

I was talking to a former Secretary of a bakers' union who had also been editor (actively rather than just nominally) of his union's journal. He was telling me how, despite the cost, his union felt it worthwhile posting the journal direct to their members. One night on his way out of a bakery he had been visiting he saw an envelope unopened in a bin. He picked it out and looked at the name of the member who had dared to discard the journal unread. 'And what did you do about it?' I asked. 'When I got home,' he told me, 'I picked up the phone and spoke to the lad's father.'

To further add to the complexity of the picture, the union 'movement' is currently going through a period of structural change. With the Australian Council of Trade Unions vigorously encouraging them and Federal Labor Government legislation easing the process, many unions are seeking amalgamation or forming industry groupings. Big unions join forces. Smaller unions are being subsumed in larger ones.

For example, in March 1992 Actors Equity, the Australian Journalists Association and the Australian Theatrical and Amusement Employees Association all voted in favour of amalgamation. This new Media Entertainment and Arts Alliance of some 35,000 members may then go on to seek amalgamation with the Musicians Union. In 1988 there were 308 unions in Australia. In June 1992 there were 227 (ABS, 1993). The ACTU aim is finally to reduce the number of unions to some twenty or thirty 'mega-unions' or groupings of unions.

Unions or the sectors within a union - actors, say, or journalists - have their different cultures, and the trainer needs to take that into account when planning and conducting single-union courses. Running a course in Newcastle for reps of the Australian Workers Union and observing this group being addressed by their Secretary, I was struck by how different the culture was to that of the MWSEU course. The exchanges were open and forthright and the Secretary had to field some tough questions, but the mood was subdued, certain formalities were observed, and the Secretary's status was carefully acknowledged.

A general union culture

There is, however, a general union culture which transcends these differences and which becomes discernible when union activists from a number of different unions or sectors of unions gather together for training. A number of factors contribute to this:

The first is to be found in the saying: 'The members are the union.' Activists 'own' their union. They pay their dues, elect their own colleagues to represent them at a local level, and elect their officials. Elections can be bitterly contested and those that win are expected to deliver. Union members can be outspoken in their criticism of their leadership, and officials often have harrowing stories to tell of facing gatherings of hostile members who have been unimpressed with their union's performance. After all, from the members' point of view, it is their money that is being spent by the union and their wages that are lost in any industrial action, so they want to see some benefit in return.

This sense of ownership spills over into the training room. Participants know that their union is putting up part or all of the money to fund their attendance. They are using up union training leave which, if they have it in their award, their union won for them. And they tend to perceive the trainers as being in much the same position as their officials and therefore answerable to them.

A second factor contributing to this culture is to be found in the concept of unity. A union is a group of people who have joined together to protect each other and to work together for the benefit of everyone in the group. Again this is underlined by the rhetoric of unionism - the use of words such as 'solidarity', and of terms of address such as 'brother', 'sister' and 'comrade'. This rhetoric can have force. Towards the end of a long day of training I ran a film on the role of multinational companies. In the discussion that followed profound political differences emerged and tempers flared. An official from a union with coverage in the hotel industry jumped to his feet and was on the point of physically assaulting an official from a clerical workers union, but his anger was rapidly defused by the intervention of another member of the course who said quietly: 'Give it up. We're all unionists here.'

The sense of being 'us' against 'them', of being unionists against management, of being in a continual struggle to guard and promote the interests of 'ordinary' people like oneself is a powerfully unifying factor. In fact it could be argued that this sense of unity is strongest in a training context where participants can examine the ideals and principles that are common to the union movement as a whole. Interesting encounters often occur at training courses and transactions between unlikely people can take place both inside and outside the formal training sessions.

Two union Secretaries from the west found themselves together for a fortnight at a residential course in an eastern state. Their unions came from different ends of the political spectrum and these two had clashed in Trades and Labour Council politics in their home state on a number of occasions. Normally they would not have had any dealings with each other except coldly and publicly across the floor of a meeting room. But they were at the course and neither one was about to travel back the thousands of kilometres he had just come, so they agreed to get on with it, and worked together in the same small groups and on the same side in a negotiating exercise. This was possible because the principles of unionism that governed the course overrode their parochial differences and even their considerable personal and political ones. On the second last morning of the course, amidst much loudly expressed fear that this might lose them their posts when their respective unions next held elections, these two antagonists stood side by side for the formal course photograph.

A third factor that goes to creating this general union culture is that union activists are concerned not only about their own wages and conditions but about those of others. A workplace representative's role is to represent others in her or his workplace - and to do this for no extra pay. A union advocate's job is to go in fighting

on behalf of the members of his or her union before the Commission. Union officials' responsibilities include protecting members from unfair dismissal, handling members' grievances and ensuring that members receive all their entitlements under their awards. Despite any scoffing this comment might elicit from unionists themselves, this concern for the rights of others means that the union culture is a caring culture - albeit a rough and ready kind of caring on occasions. Union officials and officers work long and gruelling hours, have to handle stressful situations often full of conflict, can travel away from home a great deal, and will often be doing all this on behalf of an individual member whose commitment to the union has not gone beyond fairly reluctantly paying his or her union dues.

The caring side of the union culture is evidenced at a national level in the Australian Council of Trade Unions' insistence on the inclusion of the social wage in the Prices and Income Accord in the early eighties, and the restraint on the part of the more powerful unions in their wages demands throughout the eighties in order to help unions representing lower paid workers make gains. The Clothing Trades Union's successful campaign to get an award established to cover outworkers in the clothing industry is an example of a union fighting on behalf of workers, many of whom were not members. And the waterfront unions in Australia regularly take action, which involves sacrifices by their members, to make 'flags of convenience' ships that dock here pay their crews internationally agreed minimum wages. Union history is about people acting collectively not only to protect themselves but to protect others. Both the trainers and the participants in a training course will often have stories to tell with pride.

A fourth factor is that unions are concerned with people's pay. This makes unions and their activities central to people's lives and to the political and economic affairs of the country. People of certain political hues might try to deny the importance of unions and the industrially naive might be unaware of the degree to which unions influence their lives (and are responsible for benefits they enjoy), but those politicians who consult with unions and those politicians who try to undermine the rights of unions know, as do union activists, that what unions do is important - to individuals, to enterprises, to industries and to the country. The commitment activists give to their union can be of a different kind and intensity from the commitment they may give to other organisations. This intensity can sometimes be felt in the training room.

The final factor contributing to this general union culture is that unionists can feel beleaguered. Despite the fact that over three million workers in Australia are members, unions it would seem are unpopular. Unions - again often depicted as

being essentially a single entity - regularly come under attack in the media from commentators, politicians and, if some vox populi interviews and straw polls are to be believed, the general public. I wonder whether the perception that unions are unpopular is accurate but there is no denying the perception since the ACTU itself has accepted that unions need to be promoted more positively and set aside funds to do just that.

Certainly unions rarely get fair coverage in news stories. Stories of industrial disputes concentrate on the strike, the picketing and the marches - that is, the actual industrial action taken by the unions involved. If the reasons for the action are mentioned, it will normally be late in the story, and sometimes there will be no background given to the dispute at all. The media rarely carry details of the endless unsung work of representing members that unions engage in day after day at workplace level, at the negotiating tables with management bodies, in committee rooms with public servants and politicians, and in the state and federal industrial commissions.

Union activists, who give over their time and energies to these activities, can resent the misrepresentation of themselves and their organisations. And I myself know only too well the unionist's classic impatience with a person who expresses anti-union sentiments in response to a report of industrial action yet unquestioningly accepts wage increases negotiated by unions covering their industry, and who enjoys paid recreational leave, long service leave, sick leave entitlements and so on, all benefits won for the workforce by unions. But resentment, as we shall see later in this book, can be channelled.

Chapter 5: Language and Methods

Speaking the language

The fact that unionists share a general culture means that participants in a union course may speak their own 'language', and the trainer needs to be both fluent in it and comfortable with it. An academic teacher of accountancy gradually alienated a group of union administrators over a series of training sessions dealing with basic principles of accountancy. His language was too general and dispassionate: '.....the balance sheet of your *organisation* ...' And he distributed a company report as an example rather than taking the trouble to find a copy of a union's accounts. The crunch came when he led a session on managing surplus funds and recommended certain forms of investment based solely on the criterion of yield and with no apparent regard for the ethics or political nature of the investment.

It is not surprising, therefore, that most union trainers are drawn from a union background, and that their union experience is considered to be their most important qualification. A trainer for a building workers' union was formerly an organiser with a banking union. An official with a health industry union lost an election and the position that went with it, and took up the post of education officer with another union. And, as was the case with the four people described in the second chapter, almost all trainers with TUTA held positions in unions as Secretaries, industrial officers or organisers, or had been experienced workplace representatives, before coming into the organisation. Those few of us who went into union training from other fields were conscious of being rigorously interviewed before appointment, and under scrutiny for some time after we took up the job.

Matching the methods

And the methods must match the culture. A lecture would not have gone down well - indeed, would simply not have gone down - with the MWSEU crowd. Too much of the professional teacher's questioning technique can irritate union activists used to simply getting hold of the information they need and getting on with it. 'Why should I try to answer to that? You're meant to tell me,' was a response I received to one such question. And unionists do not take kindly to some experiential methods of training if the relevance of the method to their union concerns does not become quickly obvious. Merry icebreakers may not work as intended.

Jarvis (1983) describes three main teaching modes - the *didactic*, the *socratic* and the *facilitative*. Each is a common and recognisable teaching style, and in some teaching and training contexts each could be used on its own. But union training needs to be a judicious mix of all three:

The didactic mode of teaching is the 'traditional' one in which the trainer transfers a body of knowledge or a skill to the trainees by telling or instructing them. The trainer is the expert because he or she has the knowledge or the skill and the trainees do not. The image often used is that of the trainees being empty jugs which the trainer fills up. The didactic trainer has authority because of her or his expertise, and can maintain tight control over the training event by releasing only so much of the knowledge or skill as he or she chooses.

The position of people in the training room often reflects this power relationship. The trainer stands in front of the trainees, perhaps even on a rostrum or small platform. The trainer is speaking, active, able to move about the room. The trainees are seated in rows, listening, inactive. Or the trainer is demonstrating with the trainees grouped submissively around or crowded behind looking over the trainer's shoulder. Or the trainer is issuing instructions, which the trainees obey.

The didactic mode is not out of place in the union culture. Union conferences and mass meetings are normally conducted formally, so that activists must become accustomed to listening to speeches. Even at small workplace meetings where formal meeting procedure might be dispensed with, members will be accustomed to listening to reports by visiting officials and by their workplace representatives. In the union training room there will be many occasions when the trainer has information to impart or skills to teach, and didactic training methods will be the most appropriate. But the egalitarian nature of unionism will make it difficult for a trainer to maintain the unequal power relationship that often goes with the didactic mode. Participants will resent it if they sense that the trainer is holding back, and are likely to make their resentment felt. And the trainer will be accorded authority by the participants only for as long as the trainer can demonstrate that what he or she is providing is relevant to the participants and their unions.

The socratic mode of teaching is based on the question. The trainer poses problems and then helps the trainees search for the solutions by careful questioning. This is in direct contrast to the didactic mode where the trainer provides the solutions. The socratic mode of training requires experience and skill. In progress the training might appear unstructured and informal but the skilful trainer will have planned the stages through which he or she wants to take the trainees, will have all the necessary

questions in mind, and will know exactly where he or she wants the trainees to get to. In the socratic mode the learning is as much in the processes of identifying the problem and searching for solutions as it is in the solutions themselves.

The socratic mode has a logical place in union training. Union action at all levels is about identifying, understanding and dealing with problems. Because of the continuous interplay of common and conflicting interests in the industrial relations arena, no solution will last forever so the union activist needs to be continually asking new questions and searching for new answers. The socratic mode of training helps participants develop the skills to do this.

A trainer employing *the facilitative mode of teaching* provides suitable contexts and sets up situations in which the trainees can work together to achieve their own learning. The skilful facilitative trainer can create a suitable mood or 'climate' for learning in a group of trainees, can make groups work well, can put the right people together to help each other learn, and can select, design and conduct exercises that will help trainees take their thinking and learning to higher levels.

Clearly the facilitative mode has its place in union training since unionism is based on the same concepts of self-help and cooperative endeavour. Unions were formed by groups of people coming together to do things for themselves. The active nature of most facilitative learning is appropriate too. A trainer working in the facilitative mode will make use of experiential learning methods such as simulations and role-plays. These require the participants to learn by doing, and so are likely to suit the learning styles of participants who by definition are activists.

Good union training

Each of the TUTA trainers I described in an earlier chapter operated in all three training modes. They had ideals and knowledge drawn from their own union experiences, which meant that they had messages to get across and they used didactic methods to do so. Each understood the value of getting participants to discover solutions for themselves so used socratic methods. And each understood that activists need to learn by doing and to practise what they have learnt, so designed courses around exercises and activities. Their styles and the way they mixed the modes may have varied but each 'spoke the language' and matched his or her methods to the culture. As a result each provided not just good training but good union training.

Chapter 6: Management Training, Adult Education and Union Training

Trade union training may be different from other forms of training and adult education, but does it differ in kind or only in degree? Obviously all organisations develop their own cultures, have their own 'characters' amongst their training personnel, and will produce their own particular mix of methods to suit their organisation and their participants. But is union training so different that it deserves to be placed in a category by itself? Is it unique?

Contracts

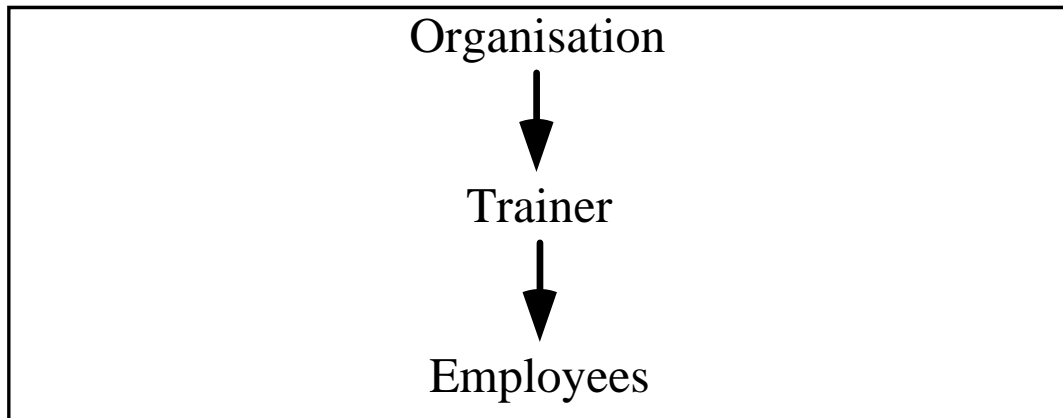
I do not believe that we can effectively answer these questions if we restrict our examination to methods or content. Most good training, after all, makes use of didactic, socratic and facilitative methods. And a lot of the content of union training - communication skills, problem-solving, negotiation, the theory of work organisation and so on - will occur just as often in other kinds of training and adult education.

It is my contention, however, that we will begin to see significant differences if we look at the 'contracts' trainers and adult educators enter into with the bodies that appoint them, and with the participants in their courses. I want, therefore, to spend some time looking at these contracts - firstly, those entered into by a trainer employed by management, then those entered into by an adult educator, and finally the contracts entered into by the trade union trainer. By 'contract' I mean more than the formal one that defines a person's duties and conditions of employment. I am also referring to the relationships and sets of obligations, both formal and informal, that will exist between all the parties - everyone - involved in a program of adult education or training.

Management training

A trainer employed by management, whether in a private or public sector organisation, enters into a set of straightforward contractual relationships with both the organisation and the people he or she is employed to train. The relationships are based on a hierarchical authority structure: the *organisation* employs the *trainer* to train the *employees*. The relationships are represented diagrammatically in figure 1. below:

Fig 1.



Although the contracts are straightforward, there are several points to be made about them. The first is that the organisation's objectives are paramount. Clearly senior management may consult with the trainer and allow the trainer to specify training objectives - so long as these training objectives sit well with the overall organisational ones. But it is management that decides to seek higher profits, change product, relocate offices or plant, expand or contract. It is the organisation's 'mission' that defines the parameters within which any training might take place.

The second point is that the trainer is employed to help the organisation achieve its objectives. That is what he or she is paid to do. It is not part of the trainer's job to critically examine, or to help others critically examine, those objectives. A trainer unhappy with the organisation's mission or objectives must either knuckle down and live with them, or seek employment elsewhere.

And third, in the course of training the trainer enters into an equally hierarchical relationship or contract with the participants. In a sense the trainer represents management. Backed up by the authority of the employing organisation, the trainer helps participants in the courses develop the knowledge, skills and attitudes necessary to achieve the organisation's objectives. The trainer does not consider the needs of the participants as individual people but as employees performing a function decided by the organisation. In their turn, employees who are unhappy with the objectives of the organisation must knuckle down and live with them, or go elsewhere.

It is in the 'evaluation' of this kind of training that the hierarchical, one-way nature of the contracts is most obvious. The criterion for judging success will be whether or not specified competencies or performance objectives are being achieved. Employees may be tested or monitored to establish whether as a result of the

training they are able to perform their roles within the organisation more effectively and more efficiently. They will not be invited to participate in a genuine evaluation of the course or the training programme or the organisation - that is, they will not be invited to help examine the *worth* of what they have learnt or of what they, the trainer and the organisation are doing. The exercise will be one of assessment rather than evaluation, with the employee the object of that assessment and the ultimate yardstick being whether or not the organisation has benefited from the training.

Is this an oversimplification?

Well, the cold language of human resource development (HRD) would suggest not. Human beings are designated as resources, to be exploited by the organisation along with its other, less animate resources.

[I]t should be noted that all organisations, the successful and the unsuccessful alike, began their operations with three major ingredients for success: financial resources (money and securities), physical resources (equipment, tools, facilities), and human resources (people to do the work). The management team has to develop and manage these three critical resources. If an organisation's success is equated to goal achievement, as it certainly should be, the enterprise achieves that mission through well-developed and well-managed resources (Nadler and Wiggs, 1986, p.2).

Organisational needs take precedence. This sentiment can be couched in more humane language than that of Nadler and Wiggs. Robinson (1988), for example, talks of training being concerned with job satisfaction and fairness as well as organisational success but when the crunch comes and he talks of evaluation, validation and assessment he says:

Measuring the results of training is vital in order to ensure that what is being done is effective and is meeting the organisational needs (p.236)

Such a statement may sound obvious but when organisational needs take precedence the trainer can find him or herself being asked to perform morally dubious roles. For example, noise in the workplace can and does damage hearing. The solution is to remove the noise but this may well involve redesigning buildings, replacing plant and machinery or isolating the sources of noise, all of which can be very expensive. A cheaper alternative is to require the workers to wear ear muffs. But ear muffs are not always effective, they can be uncomfortable after a time, and they restrict the perceptions, the activities and the ability to relate of the people wearing

them. They are clearly unsatisfactory and should only be used as a temporary expedient until the source of the noise can be removed. Yet industrial trainers can find themselves being required to train members of their organisations' workforces in the use of ear plugs or ear muffs as if this were the only response available. The organisational need for profit overrides considerations of welfare and safety.

And the trainer is servant. Here is a writer on industrial training outlining the first step in a six-step training paradigm. He proposes communication between management and the trainer, but with the trainer in the subservient role of a receiver only:

This first stage requires close and clear communication between the policy making bodies and the training department. The training department needs to know both the organisation's plans for the next year and the longer term plans. It will need to know whether the organisation is to expand, contract or change its 'product' or location in any significant way ... (Smith in Tight, 1983, p.95).

The arrow is definitely one way.

The hierarchical nature of the contracts can be disguised by the rhetoric of consultation, participatory decision-making and industrial democracy. The late nineteen eighties and early nineties in Australia have seen a push from unions, employers and government to restructure awards and to reorganise ways of working. As part of this process there have been many genuine attempts to introduce consultation into workplaces. Consultative councils made up of workers and management have been established in a number of enterprises, authorities and government departments; and many of these councils have established training committees to oversee the implementation of skill formation programs. Much of this consultation is genuine, but the contractual relationships between the organisation, the trainer and the employees being trained remain the same. Consultation is consultation, not shared decision-making.

This was brought home to me when I was helping lead a two-day planning workshop for a public sector authority. The workshop was set up by the authority's industrial relations manager and its purpose was to consult with people drawn from middle management in order to draw up strategies for implementing a number of changes in organisational structure, work organisation, and work and management practices. My co-leader and I were given fairly free rein in the design of the two days, and we conducted the first day without any intervention from the industrial relations manager. With the fourteen participants we worked through a number of exercises to

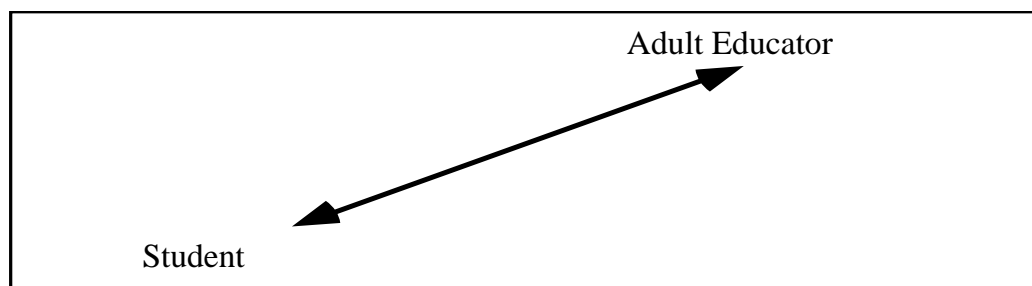
locate the authority in its historical, political and economic contexts, examined the authority's strengths and weaknesses, and reviewed a paper on structural efficiency prepared by the industrial relations manager.

My co-leader and I had done a certain amount of research in preparation for the workshop and had interviewed most of the participants over the previous week, so at the end of the first day we felt sufficiently well informed to set about allocating participants to sub-groups for the next day and deciding on the problems each sub-group would examine. It was at this stage that the industrial relations manager intervened. No, the sub groups were not right, and no, the problems we had identified were not quite the ones she wanted the groups to work on. The lines of authority were made absolutely clear. Although my colleague and I had been employed to conduct the two days according to our design, when the crunch came the industrial relations manager felt entitled to dictate to us; and short of abandoning the workshop we were obliged to accept the changes she proposed. We had intended putting the problems to be addressed to the full group the next morning and seeking approval before proceeding but now we simply presented the participants with the industrial relations manager's choices and set the day going. Everyone knuckled down.

The 'pure' adult educator

The contract the adult educator providing non-credit adult education enters into with her or his students is very different. It can be represented like this.

Fig.2



The line of authority runs both ways. The teacher and the student meet, the student to learn and the teacher to help the student learn. Together they develop the curriculum. In its purest form the encounter is divorced from any organisation or anyone else's objectives. The teacher and the student stand alone in a two-way

relationship over which both ostensibly have equal control. Here is Paulo Freire talking of his educational work with people in slums and villages in latin America:

Our method, then, was to be based on dialogue, which is a horizontal relationship between persons ... Born of a critical matrix, dialogue creates a critical attitude ... It is nourished by love, humility, hope, faith and trust. When the two 'poles' of the dialogue are thus linked by love, hope, and mutual trust, they can join in the critical search for something. Only dialogue truly communicates (Freire, 1976, p. 45).

From the pragmatic, depersonalised worlds of human resource development and industrial training we are transported to a world in which words like love, humility, hope, faith and trust are used - and used unashamedly. It is a contractual relationship based squarely on the concepts of mutual respect and adult equality.

Freire may state an ideal in idealistic language but the idea of teacher and learner relating as equals and collaborating in the design of the learning programme is central to much of the liberal-humanist traditions of adult education. A major feature of the Workers' Educational Association in its early days, for example, was that teachers negotiated the curriculum of each course with their students. Often the first meeting of a course was given over completely to this, and the appointment of a class representative ensured that feedback and adjustment to the curriculum continued as the course progressed. This tradition has spread and some form of consultation now takes place, or at least is recommended, in most non-credit adult education. Draves (1984) echoes other practical adult education teaching guides by recommending that early in any course a teacher must elicit from the students their expectations, measure these against the course design and restructure the course as necessary.

The contract, then, is based on the adult educator being responsive to the learner's wishes, to the learner's interests and to the learner's needs. Indeed in this kind of 'pure' adult education the identification of need becomes a central tenet.

.... [P]erhaps the highest expression of the art of the adult educator is the skill in helping adults discover and become interested in meeting their real needs (Knowles, 1980, p. 82).

This emphasis on meeting the learner's needs is not surprising because the learner usually engages in the learning voluntarily, and is likely to withdraw if he or she can see no benefit in staying. Whereas in management training, evaluation was

in the form of an assessment of the trainees by the organisation, in this kind of adult education the learners do the evaluation and judge the activity according to whether or not it is bringing any benefits to them and therefore whether or not it is worth continuing to attend.

The voluntary nature of this kind of adult education ensures that the contract is two-way and that the adult educator will try to keep it that way. But my depiction of the contract in Figure 2. did not place the learner and the teacher on the same level. Although some adult educators strive for an absolutely equal relationship between teacher and learner - Freire's horizontal relationship - I doubt if they ever achieve it.

Firstly, the educator has the history of conventional education to contend with. However hard he or she tries to avoid it happening, the learners will often adopt a traditionally subservient student-teacher relationship based on their previous experience in educational institutions. Sometimes learners will want to be told, and will resent having responsibility for learning thrust back on to them. And sometimes learners will be suspicious of the educator who, by seeking to consult, appears to abandon his or her responsibility as 'teacher'.

But secondly and more importantly, whether the educator likes it or not, she or he is expert in method. The educator might try to treat the learner as an equal but in most cases it will be the educator who is expert in assessing and helping people articulate needs and so will naturally assume control of this process. In most cases, once needs have been identified, it will be the educator who knows which methods will be the best ones to use in order to meet those needs. We can advocate dialogue, yes, but as the years pass the educator becomes ever more experienced and expert in using dialogue, whilst each new group of people she or he meets may well be unaccustomed to such practice, and their contribution to the 'dialogue' halting and confused. Freire, himself, after engaging in dialogue with people in his study circles would withdraw and together with university colleagues analyse the dialogues, seeking to identify themes and to hone and perfect his methodology.

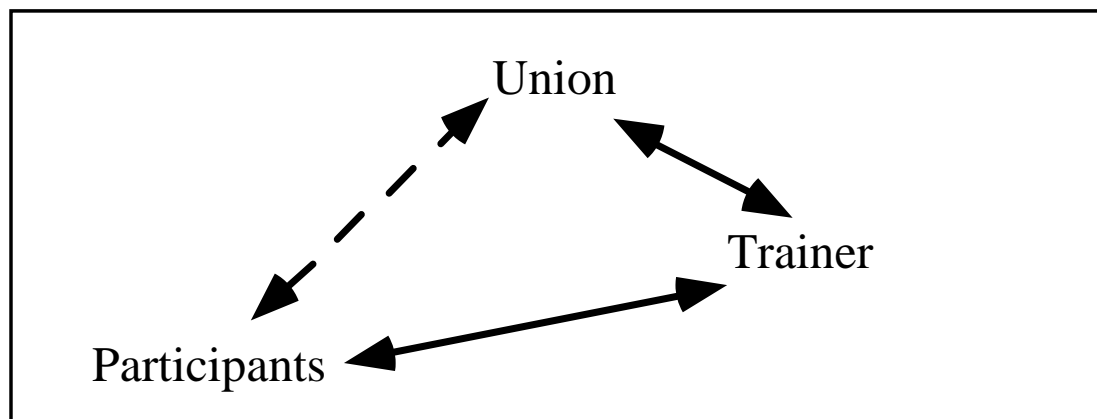
It seems reasonable then to depict this contract as two-way, yet with an element of authority continuing to reside with the educator, whether that educator recognises it or not. The arrow is tilted.

The union trainer

In contrast to the organisational trainer or the adult educator, the union trainer enters into a more complex set of contracts in which no party can claim any durable kind of

authority. Indeed, during the process of planning and delivering training, the authority appears to shift from one party to another. The relationships a union trainer enters into with her or his union and with the participants in a union's training program can be represented like this:

Fig 3.

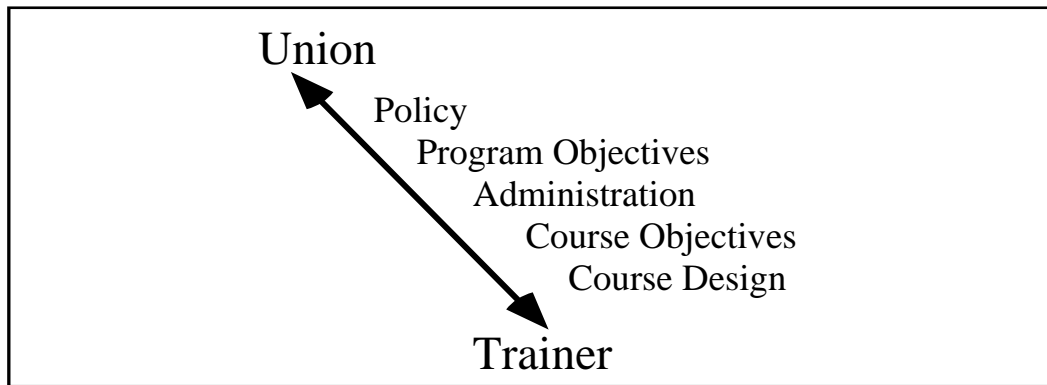


The union 'employs' the trainer so there is clearly a hierarchical element to the relationship. But the word 'employ' may not always be accurate. In smaller unions the person doing the training may be an officer with other responsibilities as well, or even an honorary official. In both these cases she or he will relate to the union in other ways as a result of other roles. In some unions the trainer or education officer may be employed in the sense that he or she receives a salary for the job but the post may be an elected one. And in many unions, yes, the training officer will be appointed.

However employed, the union trainer's relationship with the union will be two-way. In a larger union there may be a training committee, or the executive committee may set aside time to oversee training. In these cases the trainer will be an ex-officio member of the committee, or will report to the committee and take part in discussions relating to training matters. Further, since training gathers active members of a union together the trainer is often in an excellent position to provide considered feedback on the feelings of the membership. Some unions very sensibly involve the training officer in discussions, formal and informal, on union policy as well as matters more narrowly related to training.

This contract between the union and the trainer, then, dominates the planning process in union training, and we might depict it in this way to show the gradual shift of responsibility during the various planning phases:

Fig. 4.



The union through its conference decides policy and the committees interpret and execute that policy. At that level the trainer may have an influence through being involved in discussions and through providing information on the general mood of the membership as she or he encounters it in the training program. The union, through its training or other committees, would approve the overall training program. At this stage the trainer is more likely to play a significant part in formulating the program and in helping the committee check it against union policy. The trainer may take the major responsibility for the administering of the program but would clearly be accountable to the committee. And in most unions the committee would let the trainer get on with setting objectives and completing the actual design of individual courses, but the trainer would probably let the committee see the designs and seek the committee's advice and approval.

Once into the training room, the contract between the trainer and the participants dominates. Here there are certain affinities both to the contractual relationship between the management trainer and the organisation's employees, and to that between the adult educator and his or her students.

There is an element of hierarchy in the relationship. Union members will normally submit themselves to the will of the membership as a whole and will recognise this authority in their union's elected officials and appointed officers. They may have been invited to attend the course, or even instructed to, by their executive committee, or by an organiser or other union representative. And they may perceive the trainer as part of the union structure and having authority as a result.

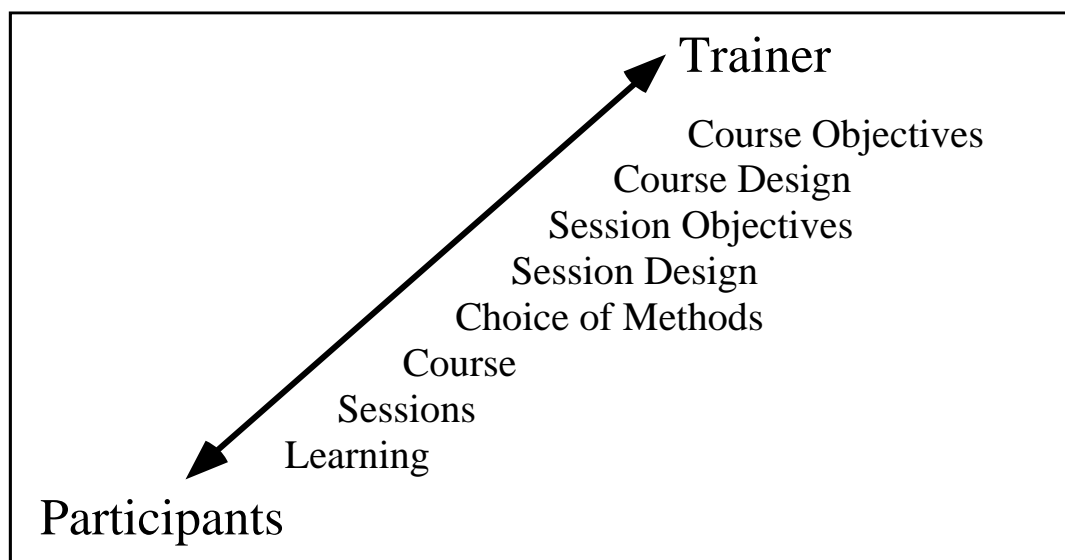
However, the relationship is a two-way one. These same participants are members of a democratic organisation, and will in all likelihood be activist members. Some may play a part in their local branch management and some may be contemplating running for election. There will a strong sense of equality of status in the training room, and some may be aware, and may even say outright, that the

trainer is being paid from their union dues. And whether stated or not the trainer will be aware of this fact.

This sense of equality will lead the participants to expect the training to be relevant to the union roles they perform. If the trainer is to succeed she or he must adjust the training by working with the participants assembled in each course to identify and respond to their particular workplace problems. Like the adult educator, the union trainer needs to be responsive, a listener, a person who bases his or her practice on concepts of solidarity, unity and trust. Like the adult educator, the union trainer will maintain control through expertise and experience in the process of identifying and responding to need.

We can depict the gradations of this control like this:

Fig. 5.



Once into the training room, the trainer is likely to get the participants to state their expectations and to match them against the course objectives. As a result the trainer may adjust the design of the course. This may flow on to some session objectives and session designs. At this stage, however, it will be the trainer who maintains most control. This will also be true in the case of the selection of teaching and learning methods to achieve these adjusted objectives. But once the course is under way, then session by session, through their involvement in the course and through the interaction that takes place within each session, the participants will exercise an increasing say in the way the course progresses. This may not occur formally, but sessions may take longer than expected because discussion takes over unexpectedly. Participants may ask for more information in a particular area or more

practice of a particular skill. Increasingly the trainer may have to consult and negotiate. 'We won't have time to go on with this discussion *and* do the second exercise. Which would you like to do?' 'I've got a video that covers that point. Would you like me to try and fit it into this afternoon's session?' 'I could see whether the Secretary can get in here tomorrow and answer those queries.' Through this kind of adjustment both the participants and the trainer work to let the participants take control of their own learning.

This adjustment was built into a four-day occupational health and safety course conducted by TUTA. The course was for unionists from a number of different unions and had three areas of content: 'soft' information (such as an introduction to occupational health and safety law, an outline of ACTU health and safety policy, and some hazard causation theory); 'hard' information on some basic physiology and a number of common hazards (such as asbestosis, noise, certain chemicals, poor or incorrect lighting, fumes and ventilation problems, etc.); and skills (such as basic research skills, site inspection, hazard identification, interviewing to get information, and report writing).

At the outset of the course an exercise was run in which the participants' various unions, industries and health and safety concerns were identified and recorded. From this information course expectations were elicited, recorded on newsprint, and taped to the wall of the training room. One of the two trainers working on the course then began dealing with some of the 'soft' information while the other trainer made arrangements with colleagues and contacts in the worker health field for a number of sessions covering the hazards participants had said they wanted dealt with, and briefed these experts on the make-up and concerns of the group. This constituted the 'hard' information section of the course. Where an expert could not be found, or the particular hazard was of concern to only one or two of the group, the trainers arranged for material from an occupational health and safety library to be available.

At the beginning of each day the course was reviewed by going through the displayed lists of expectations and agreeing on those that had been met and discussing how some at least of the others could be addressed.

The final day and a half was given over to skills related to preparing for, conducting, and reporting on, a site inspection. The workplace chosen for the practice inspection had a variety of features; and in consultation with the participants, sub-groups were formed based on participants' interests and each sub-group was asked to report back to the full group on particular aspects of the workplace visited.

On the final afternoon, the whole course was reviewed with reference to the lists of expectations; and ways of meeting any unfulfilled expectations were discussed.

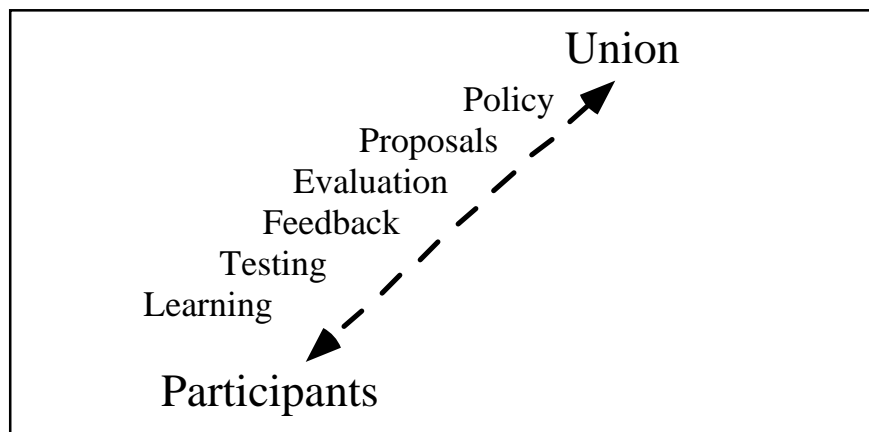
The Third Contract

The trainer is not a party to the third in the set of contracts described above, yet it could be argued that this contract has the most profound influence on the way union training is conducted. The third contract is between the participants in the course and the union they belong to, and is summed up in the saying: 'The members are the union'. It is this relationship that explains the sense of ownership that the participants in that MWSEU reps course displayed. They felt secure in their right to intervene, and to report back directly to their Secretary on how the course was going and whether it was serving theirs or the union's purpose.

Because the union is their union, because the officials are elected by them and because their dues are being used, participants consider it perfectly reasonable to provide feedback directly to their officials, and some will do so vociferously if they are dissatisfied. And because most unions have a line of representation from members to workplace representatives to organisers to senior officials, participants have a ready made channel through which to express opinions about any training they receive.

This third contract can be depicted like this:

Fig. 6



If we read up the arrow from participants to union, the participants do the learning and will test its value and relevance against their own experience as union activists. And once they are back in their workplaces or engaged in their union duties they will be able to test how useful and relevant the learning is in helping them represent their members more effectively. Some will be required by union rules or custom to give a report on the course they attended at a workplace meeting. Some will provide

feedback and informal evaluation to their union officials. And some may be required to write a formal report.

If a union's training is successful, then it will gradually equip active rank-and-file members and workplace representatives with the necessary knowledge and skills to play an increasing role in the affairs of the union. Some of these members will begin taking part in debates on union policy, putting up motions at union meetings, and seeking election to committees.

This third contract is crucial. It enables the participant to bypass the trainer and report directly to the union. It is the contract that prevents the trainer misusing her or his position as an expert in process to assume a position of authority or control over the participants. And it is the contract that prevents the union as an organisation adopting a hierarchical structure in its training provision and treating participants as manipulable 'employees'.

I do not want to suggest that all participants automatically report to their unions on every course they attend. In my diagrams I have depicted the contractual relationship between the participants and the union with a broken line and I have done this to suggest that the contract is there even though participants may not necessarily invoke it. What is important is that participants do have the right and that the trainer, the union and the participants are all aware of this.

I have also depicted the contract as a broken line to suggest its fragility. The set of three contracts represents an ideal. Certainly such sets of contractual relationships do exist in a number of union training programs, but there can be times when the third contract is broken. If this happens, then I would argue that it is as if the triangular set of contracts 'snapped' into the vertical, hierarchical set that prevail in management training. The union becomes the boss, telling the trainer what to do, and the trainer becomes a propagandist, peddling a non-negotiable line to the participants.

When the ACTU entered into the Accord with the Australian Labour Party in 1982 and the Labor Party subsequently was elected to government, the ACTU used its majority influence in the governmental structure of the Trade Union Training Authority to require the Authority to include sessions on the Accord in all its courses for workplace representatives. In courses that involved lots of interaction, that included sessions on the skills of representing shop floor opinion, that were designed to be easily adapted to the different union cultures and workplace needs of the participants, and that often opened with sessions examining participants' expectations, suddenly trainers were required to include a formal session explaining and extolling the virtues

of the Accord. The ACTU had suddenly acted like bosses, and in some sessions trainers had to bear the brunt of participants' anger and frustration.

This frustration and anger came about for two related reasons. The first was that the sessions on the Accord were unlike the rest of the course. They were lectures rather than interactive sessions, and there seemed little room for those who were politically opposed to the Accord to air and test their opposition in discussion. The second reason was that the ACTU seemed too remote to influence, and beyond the control of an ordinary union member. Who could you complain to about the inclusion, and the form, of this session on the Accord? The essential democracy that should pervade all aspects of the union movement was suddenly gone from the course.

The breaking of the third contract occurred again with the push to restructure awards that began in earnest in 1988. Trade Union Training Authority trainers and many union trainers within single unions were required by the ACTU or their union executives to promote award restructuring and to explain the structural efficiency principles upon which this radical reorganisation of working conditions would be based. My own experience was that there was anger and confusion at first on the participants' part, but the damage as a result of promoting the Accord had been done and that participants did not question nearly as vigorously the right of the trainer to push a particular line.

My three sided diagram, therefore, is a depiction of a set of contracts that does exist in some union training programs, that can exist within a democratic union context, and that I believe *should* exist in all union training.

Different contracts dominate at different stages in the training process or in relation to different aspects of the training function. The contract between the union and the trainer is the major one in the planning process. The contract between the participants and the trainer dominates in the actual delivery of the training. And the contract between the participants and the union dominates in relation to accountability and evaluation. I believe that it is the duty of union trainers and unions to protect this third contract and to nurture it. However well intended, attempts to convince members through 'training' sessions of the validity of decisions those members have not played a part in taking and against which they cannot protest will finally be counter-productive, since their trust in the training will be eroded and they will see little difference between the training offered by their union and training offered by their bosses.

As I write in the early nineteen nineties, the set of three contracts prevails in the education and training programs of a number of unions. The ACTU is accountable to

its member unions and those unions are accountable to their memberships. Sessions on award restructuring, structural efficiency principles, enterprise bargaining, international best practice, union reform and the like can still be a rocky ride for the trainer, as they should be. But the third contract has been weakened and the dangers for union training are there.

Part Two: Traditions in Adult Education and Training

Chapter 7: History, Models, Theory and Politics

Adult education and training in Australia can be seen as belonging to, and drawing from, four traditions. For the purpose of this discussion I have called them the 'liberal tradition', 'the mechanistic tradition', 'the psychotherapy tradition', and 'the community development tradition'. This chapter briefly describes these traditions and how each can contribute to union training. Following parts of the book deal with aspects of each tradition in more detail.

The liberal tradition

This tradition in adult education holds that learning should be for learning's sake, that adult education should concern itself with the pursuit of truth, and that this 'truth' can usually be found within the conventional university subject disciplines taught in a reasonably conventional academic style. It is a tradition dominated by the humanities, and it is sometimes referred to by adult educators as 'the great tradition' (Whitelock, 1974).

The development of this liberal adult education tradition is in many ways synonymous with the development of adult education in Britain; and the stages and struggles through which adult education went in Britain have influenced adult educators throughout the English speaking world. Despite Australia's distance from England and despite the geographical, demographic and cultural differences between the two countries, a number of phases in Australian adult education have mirrored those in Britain.

The story of this kind of adult education covers the establishment of the mechanics' institutes in the first half of last century and people's reactions to them; the working people's colleges in the eighteen fifties; the university extension movement in the latter part of the century; and the establishment of the Workers' Educational Association early this century. It is a story peopled with powerful, patriarchal Victorian minds, charismatic teachers, patronising philanthropists, eminent scholars, committed self-educated people, and thousands of men and women striving after an education that in the normal order of events only the elite with access to school and university could enjoy.

The tradition flows into this century and includes the development of state supported evening colleges, voluntary community adult education centres, and university extra-mural classes. It is the tradition of the non-credit, non-vocational course open to anyone, and still flourishes in Australia in the evening classes and weekend workshops in philosophy, history, psychology, sociology and literature provided by, say, the Centre for Continuing Education at Sydney University, or in the courses in communication skills, foreign languages, art, music and scores more non vocational studies provided by the WEA in Adelaide, or the Council of Adult Education in Victoria, or the adult education service in Tasmania, or the university summer schools in Western Australia.

It is a story that has been chronicled by Kelly (1970) and Peers (1972) for Britain, and by Whitelock (1970, 1974) for Australia. And although some of the current manifestations of the tradition may seem a far cry from union training, we shall see that it is this liberal tradition that provides union training in Australia with a history.

The mechanistic tradition

This is the tradition that dominates the world of organisational training: the tradition that produces curriculum design models that outline step by step the process of designing, implementing and evaluating training programs. Whereas the liberal tradition is essentially a British one, the mechanistic tradition is American, and is closely associated with the development in the United States of modern industrial and commercial practices. Given the dominance of the United States in these fields for a good part of this century it is not surprising that this mechanistic tradition has influenced training in other parts of the industrialised world.

This kind of training draws on the behaviourists and technicians for its methodology and is usually concerned with training people to achieve organisational goals. It has its own language that reflects its close relationship to industry and commerce. Trainers conduct *needs assessments* that may include *job and task analysis*. They set *objectives*, sometimes using unsettling phrases such as *terminal behaviour*. They design and conduct *training programs* that will enable trainees to meet those objectives. And they evaluate their training according to the *competencies* demonstrated by the trainees and the *measurable outcomes* in terms of profit and productivity for the organisation. The basic model in this mechanistic tradition is:

- identify needs
- set objectives
- design and deliver the training
- evaluate.

Often curriculum design models are drawn up in the form of flow-charts with the various steps the course designer has to go through placed in boxes and joined by arrows. When depicted in this form, the connection with the world of the production line becomes very clear.

The mechanistic tradition does not relate solely to industrial training, however. The word 'mechanistic' is chosen because of the models used and the kinds of assumption that underwrite these models, not in order to suggest a particular area of training. The mechanistic tradition influences all kinds of training, whether it be in industrial skills, management techniques, or interpersonal skills. We can find the tradition evident in a lot of training for 'professional' people such as lawyers, doctors and social workers. And we can find the tradition disguised but nonetheless a major influence in what appears to be education and training in the liberal or humanist mode.

There are a large number of writers to choose from in this tradition, including adult educators such as Houle (1972), Kidd (1973), Knowles (1970, 1980, 1986), Boyle (1981) and Boone (1985), trainers such as Davis (1974) and writers on human resource development such as Nadler (1970, 1989) and Field (1990), to mention just a few. All the above analyse the processes involved in designing and running educational and training programs. For its learning theory, the mechanistic tradition tends to draw on the ideas of educationalists from the school of behavioural psychology like Gagne (1970, 1988).

A number of theorists in this mechanistic tradition write uncritically from a management perspective. However, if we are aware of this and take care to translate their ideas into a union context, they can provide some some useful curriculum design models to follow.

The psychotherapy tradition

This tradition has its origins in the explosion of interest in psychotherapeutic techniques in the sixties. Again this occurred in the United States, but the interest quickly spread to Australia and elsewhere. Therapists were experimenting with a

range of group work techniques and new styles of counselling, and developing a body of writing on group dynamics. The concept of the 'group facilitator' emerged. Techniques used in therapy were taken up by others concerned with 'personal growth'. The 'human potential movement' was born.

A lot of this held an interest for adult educators since they, too, worked with groups and were 'helpers' or facilitators of learning, and some began drawing on the ideas and techniques of group therapy, sensitivity training and the like. For some, the human potential movement was adult education in its purest form, since it was concerned with developing the individual, making the individual grow, making the individual realise his or her potential. It could be argued that the goal of both the adult educator and the therapist-facilitator was to help the individuals they dealt with achieve 'self actualisation'.

The seventies found a number of adult educators working in this field, providing workshops in 'personal growth' and personal development, drawing on the thinking of therapists such as Rogers (1969) and educators such as Heron (1975, 1986). 'Experiential learning' became a popular phrase, used both to denote certain kinds of adult education, and to identify certain techniques such as simulation, role play, games and other kinds of group work that drew on and examined the life experiences of the participants. This emphasis on personal development resulted in courses on communication skills, interpersonal skills, assertion training and the like appearing in the eighties alongside holiday French, the Australian novel and life drawing in the conventional non-credit program of adult education classes. And academics such as Mezirow (1976, 1981, 1990, 1991) and Brookfield (1985, 1987) began writing about learning related to personal growth, coining or making current in the adult education world phrases such as 'perspective transformation', 'transformative learning', 'critical thinking' and 'assumption analysis'.

As we shall see, adult education and training that draws heavily on this psychotherapy tradition can become self-indulgent, directionless and dangerous, and in this degenerate form is likely to confirm a sceptical union trainer's worst fears about this kind of adult education. But the tradition cannot be ignored. Union training makes extensive use of role play and simulation, uses group work as a standard teaching and learning technique, and builds much of the learning on participants' experience. It is the psychotherapy tradition that provides the learning theory to inform these kinds of practice.

The community development tradition

This tradition has links with community work and political education. An adult educator working within this tradition tries to provide educational activities for people on their own terms and on their own home ground. He or she intervenes in other people's lives, hoping to work with those people to heighten their understanding of their own social, economic and political condition and, as part of the same process, to help them develop the skills and knowledge necessary to take greater control over their own lives. This tradition is sometimes referred to as radical adult education, and is concerned with empowering people through strengthening their sense of community and common purpose. It is political education in that its practitioners are normally concerned with redressing inequity, but that inequity is not always defined in terms of class conflict. Adult educators in this tradition tend to talk of groupings and communities defined by culture, gender, disadvantage, interest or locality as well as social class.

There are a number of possible starting points, and a number of strands, to this tradition. I have heard it argued that community development as a process of social organisation had its origins in 'enlightened' British colonial practice in Africa. We might then trace this influence to certain kinds of community work and community education in Britain during the nineteen twenties and thirties, such as the Cambridgeshire village colleges, the establishment of community centres in certain London boroughs, and individual projects such as the health and community centre in Peckham.

If we look to north America for a starting point, it has been argued that community development as a consciously applied social or educational process had its origins in the kinds of initiatives taken by government and local communities in rural America in the second half of the last century (McClusky, 1960). Meetings and conferences were held to acquaint farmers with new agricultural practices. An outcome of these initiatives was a strengthening of community feeling and the development of networks of support and cooperation. We might then trace a connection to initiatives in the nineteen twenties and thirties such as the Antigonish Movement in Nova Scotia and the establishment of the Highlander Folk School in the Appalachian mountains, both of which we will look at in more detail in subsequent chapters.

In Britain in the nineteen sixties a number of community development projects were set up in inner city areas and funded by central government. Workers in these

and similar projects often encountered an antipathy to institutions amongst the people they were meant to be working with, and the concept of the 'detached' youth or community worker emerged, with these detached workers often identifying closely with their client groups and helping mobilise them to take action. Adult education in its turn developed the concept of 'outreach', in which a community educator or outreach worker operated out of an adult education centre and sought to provide educational resources directly to particular groups or communities. The distinction between community action and community education became blurred. The work of Jackson, Lovett and others in working class Liverpool in the late sixties and early seventies is perhaps the best documented example of this kind of community adult education (Jackson, 1973; Lovett, 1975; Fletcher and Thompson, 1980).

In Australia, early forms of this tradition can be found in the educational extension work of departments of agriculture in a number of states. Under the Whitlam Labor Government in the early nineteen seventies a number of community development projects were established in inner-city areas. Some educational institutions, notably Technical and Further Education Colleges in NSW, adopted outreach policies and appointed outreach workers. Grassroots adult education organisations called variously neighbourhood houses or community adult education centres proliferated in the eighties. And some adult educators in areas such as adult basic education and Aboriginal adult education worked in this tradition where the distinction between education and action became meaningless.

This community development tradition in adult education is a disparate one, consisting of a vast array of projects and initiatives by different kinds of activist, and could well be without a strong theoretical focus if the Brazilian adult educator Paulo Freire (1972, 1973, 1985) had not written a number of short but hugely influential books reflecting on his own work in Brazil, then Chile in the nineteen fifties and sixties. Freire gives adult educators operating in this tradition ideas to use or to react to. And educational activists have taken his ideas and employed and built upon them throughout the world, so that now we have documented examples of this kind of adult education activity in, for example, Britain, Nicaragua, Tanzania, Canada, South Africa, India and Australia (Lovett, 1975, 1988; Vella, 1979; Arnold and Burke, 1983; Lovett, Clarke, and Kilmurray, 1983; Duke, 1985; Miller 1985; Kirkwood and Kirkwood, 1989; Roby Kidd Award Winners, 1990).

It is this tradition that gives adult education an activist, political 'edge'. It has a philosophical base that has affinities with the values of union education and training, in that it is concerned with developing community 'solidarity', and integrates

education with action. For the union trainer it provides examples of the educational techniques of intervention. And it is peopled with practitioners such as Paulo Freire, Moses Coady, Myles Horton and Jane Thompson whose educational action, as we shall see, was directed against economic, political and cultural oppression.

Resource

No one tradition directly informs union education but each has contributions to make. And together they provide a wealth of history, theory and practice for the union trainer to draw upon. They provide a wonderful resource.

Part Three: The Liberal Tradition

Chapter 8: Adult Education in the Nineteenth Century

In the next three chapters I want to trace the development of adult education in Britain and Australia, and speculate on how this liberal tradition has influenced union training.

The adult schools

Adult education in a form recognisable to us today probably began with the adult schools in the late eighteenth and early nineteenth century in Britain. Adult schools were part of the eighteenth century religious revival and were set up and run by evangelists and religious movements such as the Methodists and the Quakers. In essence, an adult school was a group of people who met together, normally on Sundays, and with the help of voluntary teachers learnt to read, normally in order to read the bible.

The motives of those who organised the schools were both philanthropic and moralistic. They believed that basic education within a religious context would ensure moral rectitude, prevent crime, and divert labourers from revolution. Hannah and Martha Moore were formidable early figures in the adult school movement, and Hannah Moore makes her aims perfectly clear in this journal entry from the mid-seventeen-nineties:

My plan for instructing the poor is very limited and strict. They learn of weekdays such coarse works as may fit them for servants. I allow of no writing. My object has not been to teach dogmas and opinions, but to form the lower classes to habits of industry and virtue (quoted in Kelly, 1970, p. 77).

Not all adult schools were as forbidding as those run by the Moore sisters must have been. Some moved beyond straightforward evangelism through reading, and encouraged debate and discussion. And however limited the instruction may have been, the schools gathered together the poor, the labouring class, people with a common social experience in order to learn - that is, to engage in a common activity with the purpose of bettering themselves and improving their conditions. As a result, whether intended or not, the adult schools provided an early model for organisation.

Whitelock, for example, describes Wesley's Methodist Societies as 'exemplars of organisation to trade unionism and later workers' education groups' (1974, p.21).

In the eighteenth century adult schools took many forms. Some were catechism classes, some Sunday schools for adults and children together, some organised on a very local basis around one or two people, others part of a system such as the Welsh Circulating Schools. In the nineteenth century the adult schools became a recognisable movement that flourished for some fifteen or twenty years, particularly in the south of England, waxing in the teens and waning in the eighteen thirties. As the movement waned, however, new schools were established that provided other subjects in addition to those to do with reading and the bible. And some of these began offering evening classes, so that in the place of the Sunday adult school early examples of the adult night school began to appear.

Mechanics' institutes

If adult schools were concerned with elementary education, then from the eighteenth twenties onwards a movement grew that was concerned with 'higher' or scientific education. This was the movement that saw the establishment, first in Edinburgh, then in London, then throughout the country, of the mechanics' institutes. This movement developed in response to the growing interest in science and the need for working people - 'mechanics' - to understand the technologies that were changing their working lives. The movement flourished, with mechanics' institutes, some housed in quite substantial buildings equipped with reading rooms and libraries, growing in number until the middle of the century.

Some of these mechanics' institutes went on to become established technical institutions and colleges, Birkbeck College in London University being an example, but they were exceptions and in the second half of the century the mechanics' institute movement went into decline. At first the institutes had been attended mainly by working class people and had concentrated on lectures and instruction in the 'mechanical arts'. As time passed, however, they were patronised more and more by people from other social classes and their programs were broadened to include other activities and entertainments, so that later in the century many of those that survived had become similar to clubs. Others failed to make their way in the laissez-faire economic climate of the day. These incurred debts that were impossible to meet through subscriptions that working class people could afford; and closed. By the end of the century very few mechanics' institutes still existed. The movement is

significant, however, in that it did become widespread in the twenties, thirties and forties of the last century and in doing so established adult education as a feature of British life.

The mechanics' institutes are also significant in that they provoked reactions. The founders - mostly men in the nineteenth century paternalistic mould such as Birkbeck and Brougham - discouraged lectures on politics, economics and religion, the very subjects of concern to people seeking their own voice. Some of the lectures made no allowance for the lack of elementary education on the part of the students. And members were often required to pay significant membership fees. The people for whom mechanics' institutes were created abandoned them.

.....[W]orking class intellectual energy, disappointed by the institutes, soon created other, more relevant organisations, such as the mutual improvement societies, friendly, trade union, and temperance societies and political clubs - all, significantly, under exclusively working class management (Whitelock, 1974, p.29).

Working class organisations

These 'more relevant organisations' were part of the radical struggle by working people to achieve social emancipation. In the eighteen twenties and into the thirties, the first wave of trade unionism grew and developed. Under the influence of Robert Owen, cooperative organisations were established. And in the thirties and then again in the forties the Chartists demonstrated for parliamentary and social reform. While none of these movements was primarily concerned with adult education, people involved recognised its importance, and with the examples of the mechanics' institutes, had experiences and models to follow or react to.

This period of struggle threw up self-educated leaders to whom Peers (1972, p. 29) pays this tribute:

Without the example and activities of men like (William) Lovett and (Thomas) Cooper and a host of others unremembered, the modern adult education movement.....would scarcely have been possible. The tradition and even the forms of voluntary, purposive adult education were firmly established in the midst of the struggles, which occupied the greater part of their lives, to achieve an enlightened democracy.

Indeed, as Johnson argues (1979, 1988), we can see the ideological conflict in the first half of the nineteenth century between the Radicals (trade unionists,

Cooperators and Chartists) on the one hand, and people like Brougham and Birkbeck in the mechanics institute movement on the other, as a battle between two different concepts of knowledge. Here is a radical, Benjamin Warden, attacking the mechanics' institutes in 1832:

Knowledge was very differently understood in its application to the people generally. Brougham and others summed it up as little more than honour and obey the King, and all who are in authority under him. 'You may get practical science,' say they, 'but it is only to make you better servants'. Their views expressed a limited range, while our own are founded on all known facts. Mechanics Institutes were not intended to teach the most useful knowledge, but to teach only as might be profitable to the unproductive (quoted in Johnson, 1988, p. 22).

The use of the phrase 'useful knowledge' is no accident. In 1823 Charles Knight set up as a publisher in London with the aim of providing 'useful and attractive literature for the working masses' that would counteract other cheap publications which he saw as working against the religious institutions of the country and the government. In 1826 he teamed up with Brougham to establish the Society for the Diffusion of Useful Knowledge, whose purpose was to provide publications for use within the Mechanics Institute movement. The Society lasted twenty years, and established an editorial board that required a high level of scholarship in the Society's publications but, like the Mechanics Institutes, precluded the discussion of politics.

The Society for the Diffusion of Useful Knowledge earned the scorn of the radicals. To counteract its influence and that of the Mechanics Institutes some of the radicals sought to offer an alternative concept of '*really* useful knowledge'. *Useful knowledge* they saw as knowledge for social control; while *really useful knowledge* was concerned with defining and protecting natural rights, extending democracy, critically examining the propertied nature of the state, promoting concepts of community and cooperation, explaining the existence of poverty amidst the production of wealth, and combatting the exploitation that led to it (Johnson, 1988).

The Working Men's College

The Working Men's College in London can also be seen as a reaction to the narrowly focused, vocational nature of the classes and lectures provided by the mechanics' institutes, but the outcome in this case was another, entirely different concept of knowledge from that conceived of by the radicals.

The College was established in 1854 by a group of Christian Socialists and others under the leadership of Frederick Denison Maurice and was intended to provide a liberal education for members of the artisan and working classes. The group was made up of mainly academics, clerics and lawyers. They were concerned at the class divisions that had become evident during the Chartist demonstrations and wanted to establish a college that would bring the classes together in a spirit of fellowship.

In the years leading up to the establishment of the college Maurice and his group had sponsored a number of workers' associations or cooperatives which had failed, and it was Maurice's belief that they had failed not because the people involved lacked basic skills in their trades and in accounting and organisation, but because they lacked a full and liberal education. The college was an attempt to provide this kind of education. Whether it really succeeded in doing so is open to debate but the writings by Maurice, John Ludlow, Charles Kingsley and others in the group, and the espoused philosophy of the college seem to be the first thoroughgoing statement of the liberal adult education tradition and the first coherently argued distinction between vocational or 'technical' education on the one hand and liberal adult education on the other.

Maurice and the other Christian Socialists articulated that peculiarly British idea that somehow the acquisition of the right kind of knowledge is in itself a liberation.

If, then, we are consistent with our own habitual professions, we must aim in all our teaching of the working classes at making them free. We know that they feel shackled in a thousand ways; that they ask to be delivered from their shackles. They may be wrong about the *nature* of their bondage; they are not wrong about the *fact* of it. If you think that it is upon their souls, and not upon their bodies, then you will set about emancipating their souls (Maurice, ed. Styler, 1968, p.114).

Maurice tempers this concept of emancipation:

I do not suppose, however, that the only end of Education is to make us free. It would not accomplish that object if it did not lead us to perceive an *order* in all that we do and all that we think (1968, p.114).

And he proposes to achieve this blend of freedom and order by providing working men with a college program that includes music, ethics, poetry, literature, politics, history, mathematics and painting taught by people who understand the connections

between these subjects. (Two of the first teachers of art at the college were Ruskin and Rossetti.)

What we want to make working men feel, is that the daily, ordinary business of life is compatible with - nay, is in the strictest harmony with - the best and highest knowledge (1968, p.161).

A people's college had been established in Sheffield a little ahead of the Working Men's College in London; and several other colleges, including an associated College for Working Women, were formed on the London college's model during the eighteen fifties, sixties and early seventies. The Working Men's College survives today but few of the others lasted for more than ten or fifteen years, so the people's college movement was short lived and small. However the influence of the movement was significant in that it aroused the interest of university people in adult education, expressed a philosophy of adult education that was to underwrite later more successful developments, and promoted a concept of *the best and highest knowledge*.

University extension

These later developments in adult education were the university extension movement and the Workers' Educational Association. The university extension movement came about because of certain academics' interest in making their best and highest knowledge available to people not normally catered for by the universities - to salve their consciences, cynics might say - and because of requests from certain mechanics' institutes and other adult education bodies who wanted access to university level education. In 1873 Cambridge University established its Syndicate for Extension Lectures, with London and Oxford establishing similar bodies in 1876 and 1878. Extension courses normally consisted of six or twelve weekly lectures and were taught by university people who often travelled quite considerable distances to other cities and towns to conduct them. The movement spread, establishing extension colleges in some cities and towns that subsequently became universities in their own right; and it is responsible for the fact that universities now see the provision of extra-mural or extension or continuing education courses in addition to their normal degree programs as part of their role.

The movement had its problems and to survive in the early days sometimes had to tailor its courses to those who could pay. As a result it is depicted by some as having failed the working class, but in many cases extension courses were enthusiastically supported by unions and other worker organisations, the Northumberland miners being one example (Kelly, 1970 p. 226).

Since the courses it provided reflected the universities' emphasis at that time on the humanities, the extension movement strengthened the liberal adult education tradition. But extension classes are also of significance in that they brought women into the adult education movement. Until now adult education had been mainly a male preserve, but those influential in the university extension movement saw providing education for women as an important part of their role. Kelly quotes an early woman student as describing university extension as 'a gift from heaven' and he goes on to comment that it was a gift 'all the more remarkable in that the institutions that bestowed it were themselves strongholds of masculine privilege' (1970, p. 227).

Workers' Educational Association

In 1903, following a period of recession in which the extension movement had been faltering, the Workers' Educational Association was established. The major force behind the Association's formation and its early days of extraordinary growth was Albert Mansbridge. He saw the WEA as forging an alliance between the university extension programs on the one hand, and working class people and the organisations that represented them on the other. By 1914 there were 179 local WEA branches in the country. Branches were autonomous, run by committees representing members and affiliate organisations. These branches in turn were organised into districts with district committees. And all worked within a federal system guided by a central office in London. Branches worked closely with universities, enrolling students for their extension courses, but also providing complementary courses of their own. For the first time Britain had a national, and democratically structured, adult education organisation. And this organisation was strongly committed to the liberal adult education tradition.

The alliance between the WEA and the universities produced perhaps the purest expression of the liberal adult education tradition - in the form of the three-year tutorial class. The first of these, on economic history, was held at Rochdale, starting in 1908, and was conducted by R. H. Tawney, a respected scholar from Balliol and

an inspirational teacher who in both teaching, and writing about, tutorial classes established high standards for them from the outset. Tutorial classes grew in number with universities enthusiastically taking up the challenge, and they remained a significant part of the WEA provision for the next forty years. Early tutorial classes, such as the Rochdale class, were attended by working class people who saw the opportunity of engaging in extended, coherently organised study of a university kind. Students committed themselves to regular attendance, and to extensive reading and essay writing, and a number of members of those early classes went on to play significant roles in the union and labour movements (Whitelock, 1974, p. 41).

Nineteenth century Australia

In Australia, adult education took its lead from Britain. The first mechanics' institute was established in Hobart in 1827, the second in Sydney in 1833. The movement spread rapidly with institutes in each capital city and many country towns. They differed from the British institutes in that they attracted more government funding, and that some lasted longer. In the second half of the nineteenth century, like their British counterparts, many extended their programs to include entertainments and general adult education, but in doing so they became valued educational and cultural centres for whole communities. Many mechanics' institutes, for example, were responsible for the establishment of what later became public libraries. Mechanics' institutes, or schools of the arts as they were often called, lasted in some places into the twentieth century, and in this later phase reflected the British tradition in their liberal adult education provision (Laurent, 1990).

Australia again took its lead from Britain by imitating the university extension movement. Melbourne University and Sydney University established extension boards in 1890 and 1892 respectively. The boards worked with mechanics' institutes and schools of arts, and lecturers travelled extensively to hold classes in country centres within their own states, and even interstate.

The provision was ad hoc and unsystematic, and when Mansbridge visited Australia in 1913 many involved in adult education were attracted to the structure and philosophy of the WEA. Again, in imitation of the British experience, Workers' Educational Associations were established in all capital cities except Perth. Despite all the differences between the two countries, Australia, too, moved into the twentieth century with adult education firmly set in the liberal, non-vocational British mould.

Chapter 9: Adult Education in the Twentieth Century

This century still sees Australian adult education influenced by developments in Britain and by the British liberal tradition, but there are significant differences. In Britain, whilst remaining a very small component of the educational service, adult education nonetheless gained a recognised place in the eyes of government and became part of the social fabric. In Australia, despite the efforts of very dedicated people, adult education remained uncoordinated and marginal. In both countries, however, the liberal tradition continued to dominate both the provision and the debate about provision of adult education until well into the nineteen seventies.

Britain between the wars

In Britain, with the passage of the Education Act in 1902, local education authorities (LEAs) were established to provide school and further education. Some of these LEAs also began providing adult education. At first this provision consisted mainly of evening classes in remedial education for adults, but in the period between the wars it grew to include recreational and general interest classes. Evening institutes and adult education centres began to evolve in a variety of forms around the country. While not providing liberal adult education in the university sense, these adult education institutes by and large restricted their programs to non-vocational, non-technical, non-credit courses.

In the period immediately after the first world war adult education was recognised at a national level and given definition when the Adult Education Committee of the Ministry of Reconstruction published its comprehensive and celebrated '1919 Report'. Tawney and Mansbridge were on the committee so it is no surprise that the report is a statement of the liberal tradition. The report argued that adult education had an important role to play in the life of post-war Britain. It recommended the establishment of extra-mural departments at all universities, recognised the role of the WEA, and urged greater state and local education authority support for adult education. As a result, the period between the wars saw the growth of a complex, heterogeneous provision of liberal and non-vocational education for adults that was clearly separate from the vocational world of technical and further education; that was provided by universities, local education authorities and voluntary bodies like the WEA; and that was supported by central government through grants to these 'responsible bodies'.

The WEA continued to promote its links with unions. In a sense this was slightly paradoxical in that the WEA also claimed in the language of the liberal tradition to be 'non-partisan' and politically neutral. Nonetheless in 1919, in partnership first with the Iron and Steel Trades Confederation and then with a number of other unions, the WEA formed the Workers' Educational Trade Union Committee to organise and oversee educational programs for union members.

In these inter-war years the WEA found itself with an ideological rival in the area of worker and adult education. At the beginning of the century Ruskin College had been established at Oxford to provide residential education for working people and trade unionists. By 1909 a serious split had occurred amongst staff and students there resulting in the dismissal of the Principal and a strike by students. A group of these students seceded and with the sacked Principal formed the Central Labour College. The Labour College struggled for the first few years, then moved to London, abandoned its residential work, and began organising classes in industrial areas of the country and offering correspondence courses. While the WEA stuck to the liberal traditions of the universities, the National Council of Labour Colleges based its educational philosophy on an analysis of class conflict, and offered a form of education aimed at helping workers in their struggle against capitalism. The National Council of Labour Colleges won the support of a number of left-wing unions, and it and the WEA in effect competed in the field of worker education throughout the interwar years and into the nineteen fifties (Jennings, 1977, Brown, 1980, Armstrong, 1988).

Again we can see this competition as being based on two different concepts of knowledge. The 1919 Report stated that adult education 'rests upon the twin principles of personal development and social service'. This telling phrase set the tone for much 'mainstream' adult education in both the UK and Australia for the next half century. The WEA, therefore, and other adult education agencies that received state subsidy might be said to have concerned themselves with *knowledge for social service*. The National Council of Labour Colleges however sought to remain independent from the state and to increase working class consciousness against capitalism, and so could be said to have concerned itself with *knowledge for socialism*.

In 1963 the Trades Union Congress resolved the conflict by taking over the work of both the Worker's Educational Trade Union Committee and the National Council of Labour Colleges. Both bodies were dissolved in 1965. The TUC set up its own system of regional committees, and the WEA was represented on these. It may be a

comment on the politics of the TUC at the time, but it was the organisation most thoroughly embodying the liberal tradition of adult education that survived.

Australia between the wars

In Australia, along with the states' increasing involvement in the provision of education at the end of the last century and into this century, evening schools emerged at which adults, particularly after the first world war, could receive remedial or basic education. These evening schools in some places evolved to provide leisure and recreational courses as well, but they normally depended on the energies of the school teachers who ran them in addition to their normal daytime duties; and an effectively coordinated system of evening colleges or state supported adult education did not really emerge in Australia in the interwar period.

The WEA fared differently in different states. In NSW, for example, it nearly foundered during the first world war when a number of unions withdrew their support in protest at the pro-conscription views of one of the WEA's leading lights. The Association survived and grew, but without the support of some of the more powerful unions, lost a lot of working class students. In South Australia it managed to survive while in other states by the second world war it had actually or virtually ceased to exist.

Some universities offered extension or extra-mural courses in association with the WEA, if it existed, or on their own, but in the period before the second world war adult education was, in Whitelock's words (1970, p. 15.):

... a marginal, undeveloped, poorly-regarded affair, chronically short of money and staff. It was still basically derivative of British ideas, some of which seemed inappropriate to Australian needs and conditions.

As in Britain during the period up to the second world war, there were radical alternatives to the 'mainstream' liberal tradition. Several Labour Colleges were established, although few survived for any length of time, or have left any detailed records of their activities. A number of left-wing and worker organisations saw education as an integral part of their political activities. The Victorian Socialist Party, for example, included educational activities in its program of action from its inception in 1905, offering formal lectures and cultural activities, such as a choir and an orchestra. The Communist Party offered lectures, summer schools and meetings,

and saw the importance of educating its members in the ideals of the Party and in the skills of debate. And during the thirties, under the influence of Lloyd Ross, an adult educator with strong labour connections, the WEA in NSW and the University of Sydney Department of Tutorial Classes refocussed some of their attention on the education of working class people.

Ross left adult education to become a union secretary in 1935 and during the second world war the WEA in Sydney again came into conflict with a number of left wing unions, this time over the content of a course entitled 'Political theories and movements of today'. The furore that this created reflects the same distrust the Labour College movement in Britain felt for the WEA's close relationship with the universities, and the suspicion that the liberal tradition was in reality a promulgation of the ideas and philosophies of the elite.

Australian Army Education Service

The story of adult education in Australia in the interwar years may be a dismal one, but the story of adult education in the Australian armed forces during the war is not (Whitelock, 1974). The Australian Army Education Service was established with strong Federal Government backing and from 1942 to 1946 provided education for members of the armed forces at home and overseas, with education personnel regularly moving forward with troops into battle zones. The scheme was well funded. People with appropriate qualifications were seconded to the scheme (at its peak there were nearly a thousand personnel); a library service was created; and two publications - the *Current Affairs Bulletin* and *Salt*, the servicemen's magazine - were widely circulated. The scheme provided lectures, screened documentary films, and organised discussion groups, radio programs and courses; and did this on a large scale.

The AAES had been established on the urging of Sydney University and the Secretary of its Extension Board, R. B. Madgwick, was appointed Director of Army Education. Not surprising, then, that the scheme drew its content and its practice from the liberal tradition. The Scheme's aims were to maintain morale and 'a positive faith' in the cause the forces were fighting for, to keep troops aware of the events in the war and the changes occurring in society, to equip them to deal with these changes on their return, and to provide educational recreation. The AAES is an example, in extraordinary circumstances, of adult education reaching service men and women from all social classes.

Post war Britain

Following the second world war, adult education in Britain, while remaining a very small part of the overall education provision in the country, nonetheless consolidated its position. Adult education was not specifically mentioned in the 1944 Education Act but local education authorities were required to provide further education and, as well as vocational and technical education, this was to include 'leisure-time occupations', 'cultural training' and 'recreative activities'. As a result, non-vocational adult education became part of the system, with a claim to support from the educational infrastructure, and to the use of educational facilities and plant. In the post war years an adult education service that was recognisably different from further education and higher education developed throughout the country. While never accounting for more than two or three per cent of the total expenditure on education, adult education nonetheless was a visible presence in most communities, and had a place in the social fabric.

In the immediate post-war years many of these adult education centres provided basic education and classes that appealed to working-class leisure interests. In the fifties and sixties, many had become centres that provided courses in leisure interests and hobby subjects only, and had assumed a middle class character and attracted a middle-class clientele. In the seventies, however, in keeping with the community action of that period and the rapid growth of political pressure groups, some adult education providers began trying to relate proactively to their communities, and to make a provision for people who were at an educational, economic or physical disadvantage. 'Outreach' and 'community development' techniques were tried. Adult education was again seeking to make itself relevant to those classes that did not have easy access to education.

Following the war, the WEA and the extra-mural departments in universities continued working within the liberal tradition, providing courses in non-controversial, conventionally academic subjects such as art appreciation, literature, archaeology, and history. Despite its connections with the unions, the WEA for the most part had become a fairly unimaginative junior partner to the university extension or extra-mural services. In the seventies, like local education authority adult education, parts of this WEA-university service also sought to relate more effectively to local communities or to respond more effectively to current social issues. In Liverpool, the university's institute of extension studies and the WEA made inventive attempts to provide for the

educational needs of working class people (Jackson, 1973, Lovett, 1975). In Liverpool, Southampton and London second chance courses were introduced, aimed at working class people (Yarnitt, 1980; Thompson, 1983). In Sheffield, courses on welfare rights and civil liberties were organised. Although only a small part of the whole provision, these were efforts on the part of people working within the liberal tradition to reestablish a connection with working people and the working class, and to apply some of the principles and processes from the independent working class adult education of the last century and of the Plebs League and the National Council of Labour Colleges in the first part of this century.

Post war Australia

In Australia progress was not so clear. The opportunity of 'civilianising' the army education service was lost. This large group of adult educators - because that is what they were - was disbanded with only a few of them finding places in adult education once they left the armed forces. No real direction was given at federal level to adult education and different states supported adult education in different ways. The WEA ceased to exist in all but South Australia and New South Wales. Boards of adult education were set up by a number of state governments to coordinate the provision of adult education. Certainly adult education grew but not always in a coordinated or consistent way. In the fifties and the sixties adult educators still tended to look to Britain, and a number of staff appointed to university extension services were in fact English. In contrast to the development of further and technical education services in all states, adult education remained marginal, and in parts of some states non-existent.

Developments did take place, however. Tasmania developed a reasonably coordinated service. In Victoria the Council of Adult Education, set up by an act of State Parliament after the war, established a centre in central Melbourne which by the eighties was providing non vocational courses for some sixty thousand students a year. The Council of Adult Education provided a wide ranging and inventive program of liberal and recreational studies and did not draw back from providing courses in politically and socially controversial topics. As well as running the Melbourne centre, the Council oversaw the development of country centres in Victoria, each controlled by a local advisory council made up of community representatives. In Victoria and South Australia the neighbourhood houses movement grew.

In New South Wales the Board of Adult Education was restructured in the seventies and in 1977 took on a staff of five advisers, who travelled the state supporting and encouraging adult education initiatives. Under the Board's guidance the evening colleges grew, and in the eighties were removed from the control of the Department of Education and constituted as incorporated associations with management committees drawn from their local communities. During the seventies, again with the assistance of the Board's advisers, a large number of community adult education centres were established in country centres. These were small, home grown affairs, relying heavily on volunteer support and drawing on local people in the town or area for their teachers. By the late eighties numbers of these had amalgamated or joined the growing evening or community college movement so that by 1990 New South Wales could boast a reasonably coordinated adult education service that reached most parts of the state in a rudimentary form at least. This service still reflected the liberal, non vocational tradition of adult education.

The nineties

Perhaps now in the nineties we are seeing the end of liberal adult education as a separate identifiable tradition. Certainly in Britain, under the Conservative Government of the past thirteen years, adult education services have changed, some being forced to become self supporting and therefore developing entrepreneurial programs that are similar to further education courses or that tie in with industry and the commercial world. Universities have moved from the old concepts of the liberal extension courses to the provision of updating courses for professionals, continuing education for former students, and courses and consultancies linked with industry. This education or training may often be aimed at working people, but in the jargon of human resource development, it is 'employer-led' and designed to meet organisational rather than people's needs.

In Australia universities are setting up companies to provide consultancies and continuing professional courses at commercial rates. And formerly liberal adult education centres such as the Council of Adult Education in Victoria and the evening and community colleges in NSW are offering vocational courses alongside their non-vocational provision, retraining and Skillshare courses aimed at enhancing people's employment prospects, and courses in technical subjects such as computer studies. The WEA in Sydney advertises itself now as a centre for adult education *and* computer studies. Australia has adopted the much broader definition of adult

education that has prevailed for decades in America and that includes all forms of adult learning, be it in a university, community, or commercial context. Here, as in the UK, a lot of adult education and training is now employer-led, or controlled by government through grants that can only be obtained for educational activities that conform with economic policy and are perceived to contribute to the restructuring of industry and the skilling of the workforce.

But people have decreed the liberal adult education tradition at an end before, and been proved wrong. As its history has shown, it is a very hardy plant.

Chapter 10: Union Training and the Liberal Tradition

The history of liberal adult education rolls forward in a series of waves, gathering strength in one form, losing that strength, then picking up again in another form. People's colleges follow mechanics' institutes. extension courses follow people's colleges. Along comes the WEA when the extension movement falters.

The tradition is full of characters. There are frighteningly godly people like Hannah and Martha Moore in the early days of the adult schools; inspired philanthropists and messengers of the new mechanical age such as Birkbeck and Brougham; and powerful rumbling charismatic figures like Frederick Denison Maurice with his mixture of patrician authority and belief in the integrity of the working man. There are dedicated people like Frances Martin of the College for Working Women and Mary Ward of the settlement movement; liberal university dons like Stuart and Sewell; and people like Albert Mansbridge, self made man, and Tawney, powerful intellect and inspired teacher. There are radical adult educators in Australia, such as Labour College enthusiast W.P. Earsman and the tutor, academic and union official Lloyd Ross; and the doggedly inspired Stewart of the WEA in New South Wales. Whitelock (1974, p. 197) tells the story of Stewart travelling to Newcastle to tell the inaugural meeting of the Newcastle Labour College that he disagreed with the Labour College's principles but nonetheless wished it well. Having spoken to this gathering of his rivals, he then proceeded to hand out leaflets promoting the WEA.

For its colour alone the history of liberal adult education should be of interest to the union trainer, but there are other reasons as well. The story of liberal adult education interweaves with the story of the new industrial working class and with the growth of the trade union movement throughout the nineteenth century and well into the twentieth. And it was from this liberal tradition rather than other more pragmatic traditions of training and development that modern trade union training grew.

To demonstrate this I have, once again, to describe events in Britain as well as Australia. The competition between the Labour Colleges and the WEA in Britain between the wars was concerned with worker education rather than union training. The concern was with educating working people, either in an ideology based on class analysis or in the ideologies of the liberal tradition. It was in the nineteen fifties that some districts of the WEA in consultation with the unions began developing courses that looked more directly at the kinds of knowledge and skill that union activists would need to be effective in representing their members and promoting their unions. When the TUC took over the roles of the Workers' Educational Trade Union Committee and

the National Council of Labour Colleges in the sixties, this allowed their education officers to promote training and to develop materials concerned with equipping shop stewards and union officials with the skills and knowledge needed to get on with performing their union roles. Handbooks were produced outlining procedures in grievance-handling, negotiating, running meetings, law related to industrial relations, union structures, and other matters related to conducting union affairs. In the sixties and into the seventies training films, documentaries and television programs were made examining the roles of union officials and shop stewards. Sometimes provided by the WEA, sometimes by the TUC, sometimes by individual unions, a system of union training as well as worker education emerged.

In Australia, too, the development of union training comes from people and institutions associated with the liberal tradition. The first steps in union training, as distinct from educational programs for unions and unionists, were in the sixties. In Newcastle in NSW courses were organised for unionists under the aegis of the Department of Adult Education of the University of Sydney. Peter Matthews, the member of university staff responsible for these courses, subsequently went to the Australian Council of Trade Unions in 1970 as its first Education Officer and in that position played an influential role in helping establish the Australian Trade Union Training Authority (TUTA), a statutory authority which came into existence under the Whitlam Labor Government in 1975. Matthews went to TUTA, retiring from his position as Director of Studies in 1991.

In 1964 the WEA of South Australia and the state Trades and Labour Council established a trade union postal course. From this start the WEA went on to provide courses for unionists as an adjunct to its general liberal adult education program, and in 1972 won a government grant to appoint a full-time union education officer to develop a regular program of trade union training. In 1973 a second union education post was created at the WEA and Phil Drew, who took up this appointment, moved from there to be first Director of TUTA's South Australian centre in 1975, and then moved in 1979 to Wodonga, Victoria, to take up the post of Director of TUTA's national residential Clyde Cameron College. In 1991 Drew moved to TUTA's national office in Melbourne as National Industry Program Coordinator with a major responsibility for curriculum design and the coordination of TUTA's response to the training needs of the unions in the metal industry.

In the late sixties a number of the larger unions and peak union bodies began holding courses and schools and, in the lead up to the establishment of TUTA, the

Australian National University's Centre for Continuing Education, staffed by people in the liberal adult education tradition, ran national union education schools.

Matthews came into union training from university adult education. Drew started his working life as a fitter and union activist, and then became a union trainer via the WEA. Two of the key people in the shaping of TUTA's training content and style, therefore, have associations with the liberal tradition; and both these people acknowledge that they drew on British material such as the *Shop Stewards' and Representatives' Training Teaching Manual* (Corfield, 1970) in the early development of courses. In the early stages of TUTA, particularly at Clyde Cameron College, advice on curriculum design was sought from staff at the Centre for Continuing Education at the Australian National University, and staff from that centre played a part in the first formal evaluations of courses.

From its inception in 1975, TUTA quickly established centres in each state capital and in Canberra and Newcastle, and opened Clyde Cameron College (named after the Minister for Labour in the Whitlam government who had guided the act establishing TUTA through Parliament) in 1977. For the next fifteen years TUTA dominated union training in Australia. By 1991 a number of larger unions or groupings of unions had established their own training programs and training facilities, but TUTA continued to provide a model for training content and style, and continued to play a major role in the training of its own and other unions' trainers.

While union training in Australia is almost exclusively training in skills and knowledge necessary for union activists to perform their roles effectively and is not, in terms of content, in the liberal tradition, I nonetheless believe that it is this connection through history and through institutions and individuals with the liberal tradition that creates the character and culture that I tried to capture in the first three chapters. The liberal tradition is there in the way trainers conduct their courses, it is there in the course designs that allow for group work, case study and discussion, it is there in the ample breaks allowed for members to meet informally, it is there in the use of film and video to trigger discussion and the evening sessions at the residential college given over to discussions of issues, it is there in the use of retired unionists as resource persons at the residential courses to mix informally with participants and interest them in the history of the movement and in further study and reading, and it was there in the pleasure I saw in the faces of a group of union organisers and their trainer as they walked out of a training room.

'What happened?' I asked the trainer.

‘We were looking at their award,’ he said, ‘and one of them suddenly asked what the difference was between a socialist and a social democrat. I asked them if they wanted to talk about it and they said “yeh” so we cleared the table and we’ve been at it non-stop for the last two hours.’

Useful knowledge, really useful knowledge, best and highest knowledge, knowledge for social service, or knowledge for socialism? The liberal tradition of adult education provides the union training with a history, and that history provides us with a number of choices to make.

Part Four: In the Mechanistic Mode

Chapter 11: Continuity, Sequence and Integration

In the next four chapters I want to look at the following writers from the mechanistic tradition: Ralph Tyler, Cyril Houle, Malcolm Knowles and Laurie Field. By doing this we can trace the development of the kinds of curriculum design model used by adult educators and trainers working within institutional contexts. And so long as we are aware of the political values implicit in them, these models can be adapted and applied in union training.

Tyler's model

Ralph Tyler published a small but influential book called *Basic Principles in Curriculum and Instruction* in 1949. The book is in four major chapters and these chapters in effect outline a four-stage model for planning an educational program:

1. deciding on educational purposes
2. selecting learning experiences to achieve those purposes
3. organising the learning experiences for effective instruction
4. evaluating the effectiveness of the learning experiences.

The model is simple but not simplistic. Tyler's steps are couched in the form of questions to be studied, and he explains:

No attempt is made to answer these questions since the answers will vary to some extent from one level of education to another and from one school to another. Instead of answering the questions, an explanation is given of procedures by which these questions can be answered. This constitutes a rationale by which to examine problems of curriculum and instruction (Tyler, 1949, p. 2)

Purposes

Tyler calls his first chapter: 'What educational purposes should the school seek to attain?'; and includes in the chapter subheadings such as 'Studies of the learners themselves as a source of educational objectives', 'Studies of contemporary life outside the school', and 'The use of philosophy in selecting objectives'. From the

outset, therefore, Tyler is arguing that we should take account of people, society and the intellectual climate in deciding on our educational purposes and setting our course objectives.

This is a straightforward but very necessary warning. Unions can become too closely concerned in their training with their own immediate objectives of strengthening the organisation and succeeding in particular campaigns. When deciding the overall purposes of training it would be wise as Tyler suggests to bear in mind the needs of individual members and individual workplaces. It would also make sense to consider how the union's training program might relate to other, broader issues of contemporary life. And it would be wise to check how our purpose and objectives fit into the cultural, political and ideological frameworks in which we and our members operate.

Tyler leads us to ask a whole range of questions: Will the training recognise other features of members' lives such as their family commitments, their community interests and their ethnic and cultural affiliations? Will the training take into account social and national issues such as the environment, the continuing pressures placed on the individuals and communities by the HIV virus, the current political climate, our country's relationship to the Asian-Pacific region, and so on? Is our training at the leading edge of social opinion and social change? How will it reflect current thinking on such issues as multiculturalism and equal opportunity? Will it take into account the ways members with different educational backgrounds, different workplace cultures and different work histories might learn? Indeed, in the broadest sense, what *is* the purpose of our training?

Selecting learning experiences

Tyler's second chapter is titled: 'How can learning experiences be selected which are likely to be useful in attaining these objectives?' In this chapter he makes the point that it is the experience the learner goes through that counts. The trainer may provide information, instruction and exercises and in effect create a complex environment for the participants, but it is in the participants' interaction with that environment that the learning takes place. Tyler states categorically that it is what the learners do that they learn, not what the teacher does (1949, p. 63). From this principle flow a number of others - that the participants must be given an opportunity to practice the kind of behaviour implied by the objective, that the practice should be satisfying, and that it be appropriate to the participants' present 'attainments' and 'predispositions'.

Again we might think Tyler is stating the obvious, but I witnessed a union official aglow from a trip overseas address a room full of job representatives about national economies and new national strategies for the union movement. He created an environment filled with information and his own tremendous enthusiasm for a new way of organising work and industrial relations. But if we view his performance in Tyler's terms he provided no opportunity for the participants to interact with the environment he created, so that his enthusiasm became one-sided and unshared. He provided no opportunity for the participants to practice the behaviour he exhorted them to adopt, and he paid no attention to their present levels of attainment or their predispositions. He spoke in a session leading to the lunch break, and I had to give over most of the session immediately after lunch to dealing with the anger and confusion he had left behind him. The afternoon started with a comment from one of the group: 'Why did he talk to us like that? I'm not a bloody economist!' Others complained that they did not work at a national level and so were not in a position to implement the official's new ideas and structures. And still others were angry at the way they had been prevented from discussing the views the official had been putting forward.

Organising learning

In the third chapter entitled 'How can learning experiences be organised for effective instruction' Tyler develops this theme of relevance to the learner when he warns us against designing programs or courses according to the apparent 'logic' of a subject. He draws a distinction between *logical organisation*, which he describes as 'the relationship of curriculum elements as viewed by an expert in the field' (our inspired union official, perhaps) and *psychological organisation*, which he describes as 'the relationship as it may appear to the learner' (1949, p. 97).

He warns, for example, against automatically organising history courses chronologically. This may seem 'logical' but may not be the best way a learner comes to grips with the meaning of history. The learner might actually see the relevance of historical analysis better by starting with an examination of a current state of affairs and then tracking back in various ways.

TUTA fell into the trap of following a 'logical' rather than 'psychological' order in the design of some of its early courses. The first courses for workplace delegates contained sessions on industrial relations law and detailed analyses of the industrial relations system simply because it was assumed that a union course should contain

such elements. The trainers who made the decision to include them were mostly former union officials with experience in arguing cases in the industrial relations commissions or people with an academic understanding of industrial relations law. For these people an overview of the law and the system was the logical place to start. However, as a result of evaluations and trainers' reflections on the reactions of participants it became clear that these elements were of little immediate use to workplace representatives whose concerns were more likely to be those of keeping their members in the workplace united, arguing the toss about a member's overtime payment with the pay office, or getting a supervisor to stop harassing a worker. What these participants wanted were skills in organising and communicating with their members, information about their rights and responsibilities, skills in handling grievances, and a clear enough understanding of their union's structure so that they would be able to call in the right help from the union at the right time.

TUTA was not alone. Unions running their own training programs have often made the mistake of starting with politics and ideology instead of first equipping their members with skills that will give them confidence in their roles and then examining the ideologies that underwrite those roles. Peter Matthews of TUTA recalls union Secretaries or executive committees in the sixties and seventies asking their trainers or TUTA to include union history in training courses. They would talk in terms of a subject when what they may have really wanted from their members was a commitment to the union and a recognition of the struggles unionists had gone through in order to win present conditions.

If we follow Tyler's reasoning, then we must release ourselves from the tyranny of the academic subject and look for other ways of organising learning. A lecture on the union's history may not be the way to inspire commitment in a group of new members or newly elected job delegates. But viewing and discussing *The Real Thing*, (Real to Reel Film Productions, 1984) a video of the International Union of Foodworkers' action to stop the murder of unionists at a Coca Cola bottling plant in Guatemala in 1977, just might.

Tyler argues that whatever form the organisation of learning might take, three criteria should be met. These criteria are continuity, sequence and integration.

Continuity

Continuity, Tyler says, is achieved by the reiteration of major elements in the curriculum. If a skill is taught, then the course should provide 'recurring and

continuing opportunity' for the skill to be practised. If a principle is explained, then that principle must be continually applied throughout the course. If a concept is established, then that concept must be dealt with 'again and again'.

Early in a three day course for workplace representatives, it might be stated that a key union skill is that of problem-solving. A session would be given over to processes of problem analysis and problem solving. This session would be followed by exercises. Throughout the remainder of the course the skills of problem-solving would be practised, re-examined and extended in a number of other exercises. This reiteration of the principles and the recurring opportunity to practise the skill would give the course and the learning their continuity.

Sequence

But continuity - simple reiteration - is not enough. A program of learning should have sequence as well: each experience should lead the learner to a higher level of study and understanding. In our workplace reps course, the first problem-solving exercises might be ones that can be addressed individually or in informal consultation with another rep. The trainer might distribute a list of typical workplace problems and ask the participants to work on them in pairs, then discuss and compare the solutions in plenary. This session might lead on to the processes of problem-solving in groups. Here the exercise might involve a group discussion or a role play in which small groups actually conduct informal meetings to address a particular problem. The problems used in this exercise might be single-issue problems. From here the trainer might take the group on to consider methods for dealing with more complex problems, and again set them to work in groups, role-playing a group of workers coming to grips with a number of interrelated issues. So far the course would have dealt only with problems that could be addressed by a member or a group of members of a single union. Now the trainer might ask the participants to consider how to handle problems that involved meeting with management, that is, problems that involve members of more than one party - and so lead them on to negotiation. The first negotiation exercises would involve the analysis and negotiation of a single-issue conflict. Later exercises would involve negotiating baskets of claims - that is, negotiating a number of interrelated issues. The principles and skills of problem-solving are reiterated and practised throughout the course but are taken step by careful step to an ever higher level. The course and the learning have sequence.

Integration

Tyler's third criterion is integration. A course or program of learning that has continuity and sequence should hang together, should be a whole, should have a unity. In the workplace representatives course, the role of the rep is presented as that of a problem-solver, and all sections of the course, be they concerned with relationships with the central union organisation, with the national economic picture, with changes in management and work practices, need to relate to this role of problem-solver. In an earlier chapter I described the way in which formal sessions on the Accord and award restructuring were introduced into courses that were otherwise concerned with helping workplace reps develop their activist skills, and how these formal, propagandist sessions intruded into the course design and were resented by the participants. These sessions disrupted the unity of the course, did not relate to the participants as problem-solvers, and so did not meet Tyler's criterion of integration. If these sessions had been presented as problems for the participants to analyse and offer solutions to, and if the participants had felt that their solutions might well be considered by their unions, perhaps they would have accepted the sessions as an integral part of the course.

Tyler's concept of integration, like those of continuity and sequence, focuses on the learner as much as the course design. Elements of learning should be organised in a way that allows the learner to develop a unified view, to integrate what has been learned into her or his behaviour as a whole. So the activist skills of problem-analysis and problem-solving might be developed in relation to handling a member's shopfloor grievance or in relation to running workplace meetings of members, but the learning should be organised so that the learner is encouraged to extend these problem-solving skills into other areas - say, identifying and dealing with hazards and other occupational health and safety matters, or further, to the processes of implementing new union policy and actually changing and improving the conditions of the union members in the workplace. In this kind of integrated training what has been learnt is not used in isolated, compartmentalised sections of the learner's life but *becomes a part of the learner*. The learner does not just use problem-solving skills but becomes a problem-solver.

For the union that wants to activate its members, a program of learning that meets the criteria of continuity, sequence and integration can have a profound effect because participants do not only learn. They change. If the problem solving course achieves its objective, the participants do not simply become skilled in solving

particular workplace problems, they become problem-solvers, people who can think and analyse for themselves, people who know how to decide on action.

Of course, for the union official concerned only with clinging on to her or his position, or for the autocratic manager, a course like this can present problems. Training people in the skills of problem-solving related to their immediate duties is fine, but turning them into problem-solvers is another thing altogether. If a course meets Tyler's criterion of integration, then it may be an exercise in developing ideology. After all, people who integrate analytical skills into their whole way of behaving and who see the world in terms of problems to solve have an ideology that may threaten those who try to restrict and control them.

For a paternalistically-minded union official, members trained in problem-analysis and problem-solving may really use the democratic structure of the union to question and challenge the official. What is more, they may even seek election. It is interesting to note that trainers from the early days of TUTA had stories to tell of certain union officials' disquiet at some of the training their members were receiving.

And from the autocratic employer's perspective, employees trained effectively in problem analysis may question the employer's so-called prerogative to manage, that is, challenge management's authority. It is not surprising, therefore, that some management-initiated training is subtly subverted by senior executives who approve programs that involve 'expert' consultants talking at the participants, or who send their middle management to those conferences that are regularly advertised in the press and comprise speaker after speaker with only a nominal connection between the topics. After all, a training program or conference that does not meet Tyler's criteria of continuity, sequence and integration is a harmless and unthreatening thing.

Evaluation

In his fourth chapter 'How can the effectiveness of learning experiences be evaluated?' Tyler argues that our purpose in education is to bring about a change in the behaviours of our participants and that to evaluate a learning program we need to 'appraise the behaviour' of our participants at an early point in the training, at a later point, and sometime after the training has been completed. Again Tyler makes a straightforward point which is nonetheless a useful and challenging one. How often, if we are honest, do we evaluate union training in this way? How often do we find ways of appraising the participants' behaviour - that is, observing them, checking with them as to where they see themselves, interviewing them about their roles - before the

course, then at the end, then again some months down the track? How often do we reduce evaluation to a short 'happy sheet' questionnaire at the end of the course which, if it has any value at all, can only tell us about participants' feelings at one fairly inappropriate moment? How often do we conduct courses and carry out no evaluation at all?

Tyler has written a little gem of a book and, although inevitably some of his examples are dated, many of his ideas are still thoroughly current. His model may have been initially conceived for the design of learning in schools but it has been enthusiastically taken up and developed by adult educators, trainers and human resource developers. There are probably two reasons for this. First, Tyler himself had experience in adult as well as school education, and may well have drawn quite extensively on that adult experience when developing his theories. And second, practitioners operating in the adult arena will have been able more easily to apply Tyler's learner-centred approaches than those working in school education under the joint constraints of a subject-based tradition and the rules and regulations of government.

In any event a considerable number of writers on adult education and training have expanded Tyler's model, adapted it to different contexts, and provided their own theoretical rationales and interpretations. In many of these adaptations Tyler's influence remains obvious, as evidenced in a table of major program planning models drawn up by Boone (1985). So much so, in fact, that many of the curriculum design models at present in use, particularly in the world of institution-based adult education and training, could be said to be 'Tylerian'.

Before we move on, however, it has to be noted that Tyler's model differs in one significant way from many of these later models. Although he discusses concepts of need in the first chapter of his book, this discussion is subsumed within the broader analysis of the processes of defining educational purposes. As a result, his model does not, as most models do nowadays, include the assessment of needs as a clearly articulated and significant first step in the process of developing a learning program.

Chapter 12: Credos, Categories and a Planning Framework

The next writer I want to look at is Cyril Houle. He is a self confessed Tylerian. In his book *The Design of Education* (1972) he discusses Tyler's work and says:

...[M]any of the program-planning models devised by theoreticians of adult education have flowed directly or indirectly from his [Tyler's] rationale. Certainly that is true of the framework suggested in this book (p.15).

Houle saw himself as an adult educator. He chose the field, completed a higher degree in the study of adult education, and took up a post at the University of Chicago as an instructor in adult education, all in the late nineteen-thirties and early forties when it was still rare to treat adult education as a separate field of study.

Natural desire to learn

Houle believed in

a great truth, the truth that everybody has a natural desire to learn and can profit from that learning (quoted in Griffith, 1987).

That is to say, he was committed to the idea that education should not stop at some given point but, driven by people's natural desire to go on learning, should continue throughout our lives.

Some parts of our lives, however, do not cater to our natural desire to learn. Many working people are caught in repetitive work and routines where this desire to learn is ignored or suppressed. The union trainer can be in a position to awaken this desire. A course on occupational health and safety for a group of union members, for example, should have two broad objectives: to help develop participants' skills and knowledge in occupational health and safety matters and so equip them to make their workplaces safer; *and to help them learn to learn*. By conducting the course through discussion, the trainer not only encourages the group to share information, but also demonstrates that people can learn through discussion. By starting from the participants' own experience, the trainer can demonstrate that everyone already has skills and knowledge and an awareness on which he or she can continue to build.

A good union training course, therefore, should aim to send its participants away exhilarated by the knowledge that they can go on learning. And taking note of Houle's 'great truth', a union trainer should design a program of training that allows members of the union to indulge their desire to learn. There should be further courses, books available, and people to get in touch with. Rather than providing a scatter of one-off courses, conferences and seminars, the trainer should attempt to provide a continuing and coherent program of learning, and should be continually looking for ways of making the everyday experience of being a member of the union a learning experience.

To find a program like this, Australian union trainers need to look overseas. In 1988 in north America, for example, the International Union of Bricklayers and Allied Craftsmen (BAC) developed an education statement which read in part:

The mission of the BAC Education Program is to help BAC members and their families gain a greater understanding of the world in which we live and how it affects us as working people.

The program's general objective was 'to help the union grow stronger and more capable', and among the program's specific objectives, alongside ones such as 'to enhance union leadership through skill building and learning' and 'to improve communication among the leadership and rank and file members about the union' was the objective:

to stimulate awareness of education as a lifelong process.

With this as the mission statement education officer Ed Cohen-Rosenthal and others in the Bricklayers were able to develop a program that included orientation programs, business agent (organiser) training, courses at the George Meany (residential labor education) Center, courses and programs in association with a number of university labor education centers, pre-retirement courses, further education counselling, a 'BAC to learning' campaign, leadership workshops, and a study circle program attended by thousands of members and their families in both the United States and Canada. The scale of the exercise may be north American, but the idea of providing a wide range of learning opportunities for members and those close to them as both a union service and as a strategy for helping a union 'grow stronger and more capable' makes sense in any context.

In *The Design of Education* Houle sees the providing of learning as involving three areas of activity - clarifying the credos and systems of thought you operate within; understanding and choosing the right categories of program; and developing a planning framework.

Credos and systems

In his discussion of *credos and systems* Houle starts by examining the different and sometimes conflicting assumptions and systems of thought that adult educators base their practice on: that adult education is liberal or conventional education, that adult education embodies 'a desire to subvert formalism', that adult education is the practice of responding to people's educational interests and needs, that adult education's job is to extend what is provided in schools and colleges to a wider public, and so on.

Similar or analogous credos exist in the world of union education and training, and they are often equally contradictory. Is union training about skilling up unionists or should it be providing a liberal education for working people? Is union training about helping unions operate more effectively in their industrial relations role, or is it about shifting power in the workplace from management to workers? Should union training respond to the immediate workplace needs of its members or is it really a process of implementing official union or ACTU policy? Is it training for improved productivity and better conditions or is it education for socialism?

In effect Houle is warning us to beware of given wisdoms about our work, to scrutinise what we do and the reasons why we do it, to understand the theoretical frameworks in which we operate and to apply those systems of thought critically rather than be influenced by them unconsciously. To this end he warns us about 'misapplied systems' that might influence our work - such as the belief that a training or education program is an act of public relations to promote the organisation, or an exercise in recreation, or an act of service (that is, helping clients directly rather than helping them learn), or a social activity, or therapy.

Some of this rings uncomfortably true for union training. I have seen a series of courses arranged throughout a state by a particular union, not I suspect in order to promote learning and activism in the rank-and-file but rather to promote the union Secretary and his chosen officials during the months leading up to an important election. I have seen one union course so devoted to promoting personal development that it ceased to be a union course in anything but name and became,

for some individuals on the course, a therapeutic exercise. I have seen courses where, in seeking to take advantage of the fact that members from different unions were gathered together, trainers have been in danger of letting the social or recreational objectives outweigh the educational ones.

There is about Houle, in this section of the book, the smell of an activist. In his discussion of credos and systems of thought he dwells on Kurt Lewin's change theory and on the role of the adult educator as a change agent, leading me to suspect that change theory is a system Houle himself finds particularly attractive. He also seems able uncomplicatedly to include unions within his scheme of things, meaning that he accepts the concepts of representation and action.

Houle describes change theory as resting on the idea that

in any defined social situation, the present level of accomplishment is supported by some forces and held back by others (1972, p. 19).

Once we have identified the forces for and the forces against, we can set learning goals aimed at equipping people with the skills and information necessary to promote the forces in their favour, or in favour of a desirable condition, and to combat or diminish the forces holding them back. Houle goes on:

Change theory is particularly useful when education must be undertaken in natural situations, not those formally established for the sake of learning. Its milieu is the factory, the community, the labor union, or some similar setting, particularly one in which changes must be brought about by the use of several kinds of activity.

Houle is in effect promoting an approach to the design of learning that recognises the complexity of forces and kinds of conflict of interest that operate in the workplace. He makes the point that educational responses in 'natural situations' will need to be many-faceted:

For example, a safety specialist acting as a change agent may reduce the highway accident rate by better law enforcement, improved engineering, and more effective education. He (sic) may apply this third remedy in many ways: mass campaigns to inform drivers of the rules of the road, stringent training programs for those who want drivers' licenses, instruction of engineers on appropriate standards of highway construction and of law enforcement officers on how to carry out their duties, and special courses required of habitual breakers of traffic laws (Houle, 1972, p. 20).

Categories of program

As we would expect from the quote above, in the section of his book on *categories of educational program* Houle departs from the formal institutional context Tyler was writing about and lists and describes many different kinds of adult educational activity.

This is already useful to the union trainer in that it reminds us that courses are not the only form of teaching and learning available, and that other forms may be equally, or more, suitable for the union activist: induction and instruction at the workplace, self-instruction with the use of learning kits or handbooks, mentoring (in which a newly appointed workplace rep might be paired with an experienced rep), secondments, occasional seminars, study circles, workshops, conferences, and so on.

Houle, however, does not simply list different forms of learning program. For him the distinction between his categories is not in the form of the learning activity or the teaching and learning methods used but 'in the source of authority and direction so far as planning and control are concerned' (Houle, 1972, p. 42). A teacher may use all sorts of apparently cooperative learning techniques including group work, discussions, and role play, and may employ these in various formats such as course work, seminars, workshops and field visits, but, says Houle, if the teacher is the chief designer of the whole program, then it is this fact, rather than the format or the methodology, that defines the program and distinguishes it from other educational events.

On the basis of who holds the authority and control, Houle arrives at eleven categories of 'educational design situations'. These categories serve as a reminder that different forms of control and organisational structure can be used in union training: - programs of learning under the control of the individual member, training under the control of a workplace committee, training negotiated by members with their own union officials, joint union training, training under central union control, training under ACTU control. By organising union training with Houle's system of categorisation in mind, we can break free from the standard modes of course design, and begin constructing courses, programs, activities and events capable of meeting the training requirements of members and their unions in a number of very different ways.

Houle's method of categorisation also gives us a tool by which we can more easily identify the sources of authority and control in different training programs. And if we can do that then we should state the authority openly so that participants understand the context in which they are learning. Is this course to all intents and purposes under the direction of the ACTU and therefore promoting a national policy? Is this workshop set up by a local committee and therefore designed to encourage the debate of local issues? Is this program of learning commissioned by the union executive but to all intents and purposes under the control of a consultant? Is this program really organised so that the individual members can take control of their own learning?

Planning framework

Houle's third area of activity is that of actually designing and conducting an educational activity. Here he provides a *planning framework* of 'decision points and components'. He claims that he is not presenting them as a logical sequence but in his model he numbers them and suggests they are put 'in the order which experience has shown to be most readily understood' (Houle, 1972, p. 132). The components of his framework are:

1. A possible educational activity is identified
2. A decision is made to proceed
3. Objectives are identified and refined
4. A suitable format is designed
5. The format is fitted into larger patterns of life
6. The plan is put into effect
7. The results are measured and appraised.

Houle's model is straightforward but he presents it as a number of decisions to take rather than steps to follow, and accompanies each decision-point or component in his model with detailed discussion and examples. A union trainer can read through his model, interpreting each of the stages into union terms.

For example, in his elaboration of stage five listed above - fitting the format into the larger patterns of life - Houle discusses the kinds of adjustments that teachers, participants, organisations and the people surrounding them need to make when a learning program is designed and conducted. Participants and others, he argues, will

have to modify their lifestyles to allow time and resources for the learning activity; there will be financial ramifications often reaching well beyond those immediately involved; and the activity will have to be interpreted to 'related publics' - that is, to the people, groups and organisations affected by the existence of the educational activity.

Reading this may lead a union trainer to ask questions such as: What effects will the training have on the partners, families and friends of the participants attending? What adjustments will they have to make? What will the reaction of colleagues be to a participant's absence from the shop floor or the office? What adjustments will these colleagues have to make? How will the training change the participants themselves? How will the participants affect their workplaces and their local union organisations and cultures when they return from their training? Is there follow-up and support provided for participants who may want to adopt a more proactive union role in their workplace as a result of their training? Has the union costed the training in terms of factors such as wage reimbursements? What personal costs will the participants have to bear? Has the union anticipated the less obvious costs that might arise from, say, the extra pressures on the central office of a more active membership? Do those rank-and-file members and key senior officials who are not attending the training fully understand the aims and objectives of the training? Have their possible suspicions and doubts been allayed and has their support been won? How has the training been interpreted to managements of organisations where the union has coverage? How does the training fit into the current industrial relations climate? And in cities like Wollongong in New South Wales or Port Augusta in South Australia where unions, community groups and local government cooperate closely in a number of ways, how has the training been interpreted to all these other interest groups?

Need

As his model suggests, Houle does not highlight the concept of need.

While it is true that some teaching and learning endeavours arise out of and are guided by a sense of need or deprivation, others grow out of a positive zest, interest, and desire to improve. Education has at least as much to do with the achievement of outstanding excellence as it does with bringing deficient people up to some kind of norm (Houle, 1972, p. 29).

Although talking about adult education and a whole variety of relationships and forms of control, Houle still easily uses the word 'teacher' rather than 'facilitator', 'helper', 'tutor' or any of the other less authoritarian titles people try to give the adult educator. He also uses words like 'planner' and 'analyst'. He is an advocate of the achievement of outstanding excellence, and his starting point in the planning process is really a decision to proceed. At the end of the day, it seems that he is still according the educator substantial authority and control in the adult educational process.

Chapter 13: Adult Experience and Educational Need

More than Tyler or Houle, Malcolm Knowles shifts the emphasis in program design from the educator to the learner. In his writings during the nineteen seventies Knowles popularised the term *andragogy*, describing it as 'the art and science of helping adults learn' and contrasting it with *pedagogy* which he described as the 'art and science of teaching children'. Andragogy meant placing the emphasis on the learner learning rather than the teacher teaching; on respecting and utilising the experience that adults bring to their learning; on understanding and basing learning programs on an adult learner's need to solve problems and perform new roles; and on aiding and encouraging self-direction in an adult learner.

Knowles propounded his 'theory' of andragogy in two major texts *The Modern Practice of Adult Education*, first published in 1970, and *The Adult Learner - a Neglected Species*, first published in 1973, both of which he has revised and updated. His ideas created debate amongst adult educators and a number of his basic assumptions were vigorously disputed (Jarvis, 1987), so that over the course of the revisions Knowles has shifted ground and modified the sharp distinctions he originally made between the way he saw adults learning and children learning. Perhaps it is best to say that Knowles is a practitioner who provides insights rather than sustainable theories, but whose insights, based as they are on continual reflection on his vast experience, can be very useful for other practitioners.

Experience

Knowles suggests that as we grow we develop an 'expanding reservoir of experience', and that as we shift from child to adult this experience not only continues to increase in quantity but changes in kind. While we are children, much of our experience is provided for us and, to an extent, we are defined by others. As we become adults, we increasingly take possession of our own experience, and increasingly define ourselves through that experience. In a sense, we *are* our experience.

If in our role as educators we ignore or dismiss the experience of an adult learner, says Knowles, we do far more than that. We ignore or dismiss the whole person. And that person will resent us and resist any further learning we may offer.

Associated with this discussion of experience is Knowles' discussion of how, as we move from childhood to adulthood, we move from a state of dependency to some

kind of independence. Here his insight is in the suggestion that while adults may not be totally independent, they nonetheless have a need to be *seen* as independent. Good adult learning programs, therefore, should cater for this need and provide opportunities for participants to guide and control their own learning.

To facilitate this, Knowles (1986) advocates the use of learning contracts. A learning contract is a complete departure from the conventional teacher-set assignment in which all the students in a class are expected to complete the same task. A learning contract is an individualised project, negotiated between each participant and the trainer or adult educator, in which the participant sets his or her own learning objectives, describes the methods she or he will use to achieve those objectives, lists and describes the resources to be used (colleagues, books, videos, etc.), outlines what will be produced as a result (a handbook, a video, a resource pack, a piece of reflective writing, etc.), and sets the criteria by which the participant and the trainer together will judge whether the learning has been successfully achieved. By using learning contracts participants can design learning that is related to real concerns, workplace issues, and personal interests, and can produce tangible outcomes that may be of direct use in their personal or working lives.

Knowles' discussions of experience and independence, and his advocacy of learning contracts, all make sense within the union training context. Union activists normally identify themselves, coming forward during a dispute, showing an interest in the union, seeking election as a workplace representative, and then are encouraged by the union to attend some training. In union training, therefore, we are dealing with people who have demonstrated a degree of individuality and independence and who already have their own particular union experience; and the job of the trainer is to understand and use that experience by helping the learners build on it, order it and construct their own modes of practice and their own programs for further learning from it.

The challenge for the trainer is to balance Knowles' twin imperatives - that we must respect the learner's experience and that we must respect the learner's need to be seen as self-directing - with the demands of the union - that the participants be acquainted with union policy and procedures so that they will be able to operate effectively within their union organisation.

Program planning model

In his curriculum or program design model, Knowles seeks to reconcile the needs and interests of the learner with the demands of the organisation. In this facet, as in

his model as a whole, he is really only elaborating on Tyler's process of course or program design. Tyler sought to reconcile the traditional, authoritarian, discipline-based ideas of curriculum design with the more progressive learner-centred models deriving from educationalists like Dewey. Knowles tries to do this in a much more pragmatic way by providing a detailed, step-by-step model for the program designer to follow.

Knowles' model involves the following steps:

1. *Establishing an organisational climate*: Here he discusses ways of establishing an educative environment within an organisation that is built on a democratic philosophy and a recognition of the need for change and growth. This he describes as 'creating a climate conducive to learning', and he argues that such a climate should be secured in the formal policy of the organisation.

2. *Establishing a structure*: Here he discusses ways of creating the right kind of committees or structure to support and promote adult education within the organisation.

3. *Assessing needs and interests*: Here he examines different kinds of needs and interests that individuals, organisations and communities might have, and then outlines a number of ways of identifying them.

4. *Translating needs into program objectives*: Here he discusses how the needs that have been assessed should be screened through three filters:- the purposes of the institution; feasibility; and the interests of the clientele. Do the needs that have been assessed match up with the purpose and policies of the organisation? Is it financially or practically feasible to try to meet these needs? Do the educational needs we have identified actually match up with the interests of the potential participants? That is, are participants interested in learning what we believe they need to learn? (Knowles does not suggest that we automatically abandon the program if the answer to this last question is no, but argues that the answer will affect the way we approach the next step.)

5. *Designing a program*: Here he discusses various principles of program and course design, and processes for selecting different formats for learning.

6. *Operating the program*: Here he discusses the practicalities of implementing and managing a program, including recruitment of teachers, promotion, recruitment of participants, management of finance and facilities, etc.

7. *Evaluating the program*: Here he discusses purposes and methods of evaluation, and the uses to which the findings can be put.

Knowles' model is a detailed elaboration of the Tylerian process of program design, and is filled with useful guidelines, practical hints, case studies and examples. His particular contributions are the adding in of steps one and two above, and the highlighting of the concept of need.

Steps one and two are of particular significance to the union trainer. If a union is to take on training seriously, then there must be a shift in culture, policy and organisational structure. The support of officials and key rank-and-file members needs to be won, and they need to be seen supporting and attending training themselves. A training policy should be argued through the various committees and put to the membership in a way that will give it equal status to other major items in the union's official policy document. And a training committee should be created, or an existing (and important) committee should be given responsibility for overseeing training, so that the provision and support of training becomes a feature of the union's regular 'business' - becomes, in effect, institutionalised as a standard item on a committee's agenda, a separate item in the union's budget, and a regular subject for debate at the union's congress or conference.

Need

Knowles' other significant development of the Tylerian model - his highlighting of the concept of need - is more problematic when considered in relation to union training, for it is here that Knowles shows his political colours.

Because of the position he held in American adult education first as executive officer of a national association and then as an influential academic, because of his excellence as a practitioner, because of his prolific and timely writing on the subject, and because of his popularisation of the concept of 'andragogy' in such a way that it almost became his personal banner, Knowles is a giant in the field. And it is this 'giant' who maintains that need is a dominant influence in the process of designing a program of learning; that the subject or the academic discipline is no longer the starting point; and that the educator may draw content from any field and employ any method so long as he or she is doing so to meet particular needs. As a result of Knowles, the process of identifying needs is now considered the natural starting point in many curriculum design models. Before the trainer can do anything else, he or she must conduct a needs analysis.

But what does 'need' mean? And whose needs are we talking about? In management training models, it is the organisation's needs that form the starting point. For the 'pure' adult educator, in theory at least, it is the learner's needs that dominate. For Knowles, we would expect the learner's needs to take precedence as well. After all, with his emphasis on the person, one would expect Knowles to be a humanist. However, on closer examination he is not.

Knowles defines an educational need as:

...something people ought to learn for their own good, for the good of an organisation or for the good of society (1980, p. 88).

There is something paradoxical here. At the very centre of Knowles' case for an educational approach that focuses on the person as an independent, self-directed learner is a definition of need that contains an authoritarian imperative. An educational need is something people *ought to learn*. The language is stern, yet ill-defined. This educational need is something you ought to learn *for your own good*. Knowles offers no suggestion as to who decides what is good, but the phrase is the kind that is often uttered by people who assume moral authority over others. And what is more, the interests of individuals are only a part of all this. An educational need is also something that people ought to learn for the good of an organisation or *for the good of society*. One can almost hear the judge pronouncing sentence from the bench in that last phrase.

And what, in Knowles' view, does society want of us? In a chapter on the 'Role and Mission of the Adult Educator', he discusses the challenges presented by accelerating change, and goes on:

The only hope now seems to be a crash program to retool the present generation of adults with the competencies required to function adequately in a condition of perpetual change. This is the deep need - the awesome challenge - presented to the adult educator by modern society (1980, p.36).

There are a couple of worrying features in this statement. The first is that he appears to depict people as passive respondents to change whose only hope is to go along with it rather than to act upon it to slow it down, or alter its direction, or make it more benign. In this vision, the adult educator is a servant of society. There is no hint of Houle's *agent* of change here.

The second worry is in the language Knowles uses. At a key moment in his argument when he talks of the mission of the adult educator he uses the terminology of the production line. The metaphor is clear. Like anonymous workers in a factory, adults need to be subjected to a *crash program* to *retool* them with the *required competencies to function adequately*. No soaring vision here, just the language of Taylorism, of scientific management, of systems in which people are trained up to, and not beyond, the competencies required to perform their allotted tasks.

Knowles, it would seem, is really an organisational man. And this impression is reinforced in a book he edited entitled *Andragogy in Action - Applying Modern Principles of Adult Learning* (1984). The book contains thirty-six case studies written by adult educators and trainers who saw themselves as applying Knowles' methods and ideas. It is interesting to note that all the case studies are of educational programs either within organisations or subject to organisational constraints. There are no case studies of adult education within the non-formal contexts of political, social or community action.

We need, therefore, to approach Knowles with caution. We need to recognise that his ideas and modes of practice have been enthusiastically taken up by human resource developers and management trainers because he has provided them with a range of apparently people-centred methods and 'humanist' theories that can actually be employed to mould people, to manipulate them, and to bring them, however wonderfully developed at a personal level, into line.

And that line is a majority north American one. Most Tylerians seem to accept the dominant American capitalist framework without comment, appear to assume (for all Knowles' talk of perpetual change) a stable societal base, and seem to be designing models for a middle-class, culturally homogeneous clientele. Knowles draws his examples uncritically from across this strand of American culture, citing adult education and training within churches, government, public bodies, business and industry, professional associations, charitable bodies, and adult and community colleges. Others such as Boyle (1981) and Knox (1986) follow suit.

These Tylerians are concerned not with challenging or radically changing organisations or society but with helping certain kinds of people make the most out of the organisational frameworks they find themselves in and the society that already exists. Phyllis Cunningham, a North American herself, goes further in her criticism:

Adult education as practiced in North America by those persons who identify themselves as adult education professionals is, for the most part, simply technology

that can be bought in the marketplace by the highest bidder. Any ethical concerns expressed by those professionals as a group are tightly framed within 'standards of practice' and 'codes of ethics' whereby the starting points of the argument assume that the way the world is organised is natural and the appropriate role of educators is to use their knowledge and skills in behalf of that order (1988, p.134).

Even Houle, with his interest in change theory, seems essentially a conformist:

The learning activities of men and women must ordinarily be introduced with some care into a complex milieu which includes work, home, civic and other responsibilities (1972, p.53).

Gently does it, he seems to be saying, since we certainly would not want to disrupt or question or challenge the milieu.

Chapter 14: Skills, Jobs, Competencies and Performance

Objectives

Tyler, Houle and Knowles are writers dealing with education or adult education in a range of sometimes quite academic or 'liberal' contexts, and it might seem surprising to regard them as the backbone to the mechanistic tradition. Yet their models and their approaches are the ones taken up in organisational and industrial training. There are a whole host of writers who have adapted and developed their ideas. Some have limited the flexibility and responsiveness that Tyler, Houle and Knowles built into their approaches, removing any of the people-centred ideas, and concentrating on the teaching of competencies and the design of learning that will achieve quantifiable outcomes. Others have been more inventive, and I want to look at Laurie Field, who is one of these.

In his *Skilling Australia* (1990) Field has sought to apply a Tylerian model creatively, and humanly, to the world of industrial training. He draws his examples from the training of hairdressers, road tanker drivers, draftspeople, bank clerks, car mechanics, chemical workers, telecommunications technicians, retail industry workers, workers in the food industry, etc., and is writing, without apology, about training people in the skills needed to perform their work effectively.

Designing training

Field's model consists of the following stages:

1. *Investigate skills and training issues*: Here he discusses how the trainer might enter a workplace, carry out an exploratory study, and then use different kinds of research to understand the workplace and identify the problems and issues that can be addressed through training. He compares action-research with descriptive survey research, and other methods of needs analysis.

2. *Analyse competencies for a job*: Here he discusses the trend towards competency-based training in Australia, and shows how to develop comprehensive lists of competencies necessary to perform particular jobs.

3. *State performance objectives*: Here he discusses how to write performance objectives that state the activity, the conditions under which the activity must be performed and the standards which must be achieved for each competency identified.

4. *Structure a training program*: Here he examines different ways of building a sequence into a training program, and the different ways skills training can be provided. These include off-site training in a college, in-house training, simulator training (often using computer models), and on-the-job training.

6. *Providing the training*: Field then provides a number of chapters looking at different methods of delivering training. There are chapters on the design and use of job aids such as reference guides, user manuals and computer aids; on-the-job training; the use of computers in training; and modularised training. He also devotes a chapter to the processes involved in explaining and demonstrating a task.

7. *Supervise practice*: At several stages in the book Field discusses the processes of transferring skills learnt to the actual job. In this chapter he examines ways of providing the learner with structured and supervised practice in the skills learnt.

8. *Assess skills*: Here he discusses ways of testing learners' competence, and assessing the change in their skills and knowledge as a result of the training.

As even the brief summary above will indicate, Field is concerned with getting people to work more skilfully to make the organisation more efficient and more productive. He is unquestioning in his acceptance of the ultimate right of managers to manage, and of the obligation placed on workers to submit to organisational requirements. He argues that organisations can and should be changed to increase efficiency, and that there should be moves towards a 'more co-operative, participative relationship between workers and management' (p. 8) but he does not consider training as a potential process for actually changing the power structures in the workplace. He refers to the ideas of Bill Ford and cites a number of Ford's articles in his bibliography, but he does not go on to examine the revolutionary effects on relationships in the workplace that would occur if Ford's model (Ford, 1988) for the reform of work were fully implemented.

Field mentions unions in his book but once past the introductory chapter they are relegated to the role of bit players who may have to be consulted now and again and whose attitudes may occasionally have to be taken into account. He does not refer to the proactive role unions in Australia have played at both national and local levels in introducing career paths into industrial agreements and awards, and in obliging reluctant managements to provide their workers with the training needed to progress up those career paths. Nor does he canvass the possibility that when changes are introduced into a workplace in the form of new technologies and new kinds of

training, workers will need strong, independent representation, and in some cases vigorous protection.

Nonetheless, there are at least two reasons why union trainers should take account of Field's ideas. The first is that the book is an excellent examination of industrial training and the ways to go about it. Field provides a detailed model, careful definitions of much disputed terms like task, skill and competency, and a large number of carefully chosen examples often presented in diagrams and graphics that are skilfully worked into the text. Field strives to give industrial training a human face. He invokes the kinds of adult learning principles propounded by Knowles, argues that the individuality of workers should be recognised in training programs, and looks for opportunities to provide training that can be self-directed. He also argues for training specifically aimed at groups in the workforce such as women and migrants who have been disadvantaged as a result of discrimination, or low levels of English language skills. Reading this book will give the union trainer an insight into the processes technical education providers, unions and enlightened managements might use to develop industrial skills training within the fluid conditions of the nineteen nineties.

The second reason is that some of Field's ideas can be applied to the training of unionists as unionists. Three sections of his book are of particular interest. These are his discussion of *types of skill*; the processes he proposes for *analysing the competencies* for a job; and the *hierarchy of learner responses* that he suggests can be used to structure a training program.

Types of skill

Field divides skills needed in the workplace into five clusters: task skills, task management skills, work environment skills, workplace learning skills, and work relationship skills.

Task skills are those skills workers need to perform routine and predictable tasks central to their jobs. They can be described and demonstrated by the worker, and we could argue that most industrial training has for years concentrated on teaching workers these kinds of task skill and little else. Field employs the image of an iceberg and argues that task skills, once a worker has become competent in them, are visible and largely above the surface.

The other types of skill, however, are much more likely to be under the surface. And although aspects of these skills will not be easily visible or easily described, Field argues that they are just as essential in order to make a worker and a workforce

effective. *Task management skills* are those skills that workers need to coordinate their work, avoid wastage, apply standards and anticipate and resolve problems. *Work environment skills* are those needed to work effectively within an organisation and within the physical and technological constraints it imposes (and to change those aspects of the work environment that are unsatisfactory). *Workplace learning skills* are those that enable workers to progress, to adapt to or initiate change, to reflect, to learn for themselves and help others learn. And *interpersonal skills* are those that enable a worker to relate well and to work in a team.

Field's typology offers us a useful tool when designing courses. If we were to design a course for, say, officers responsible for their unions' publications and journals, we might be tempted to concentrate on the task skills only: - sub-editing, design, skills in using word-processing, computer graphics, and desktop publishing programs, instructing the printer, proofreading, etc. If we extended the course to include Field's other types of skill, then we would help participants examine their relationships with their central union office colleagues, their relationship with the membership as contributors and readers, their own time management, their ability to meet certain standards of publication in relationship to printing standards and to the requirements laid down in union policy, their ability to anticipate and utilise new methods of publication as technology changes, and so on. Field's typology provides a framework in which to build up a comprehensive checklist of different kinds of skill.

Analysing competencies for the job

In his process of analysing competencies Field starts by denoting a worker's occupation, then identifies the jobs that go together to make up that occupation, then identifies the competencies needed to perform each job satisfactorily, then writes a performance objective for each competency. The detailed example he gives is for the occupation of bank teller. If we apply his analysis to the post of union organiser in a particular white-collar union, then the breakdown might look like this:

Occupation: Organiser

Jobs:

1. Maintain contact between the union organisation and members in individual workplaces
2. Recruit new members

3. Organise unorganised workplaces
4. Strengthen existing union organisation in workplaces
5. Provide one-to-one induction for new office representatives
6. Interpret the award to members
7. Advise office representatives
8. Represent members in workplace disputes
9. Represent individual members in hearings before the industrial commission, etc.

Competencies for number 1. above (Maintain contact between the union and its members):

1. Conduct induction meetings for new members
2. Visit workplaces
3. Conduct regular workplace meetings for members
4. Ensure the election of an office representative
5. Maintain telephone contact with office representatives
6. Ensure dispersal of union newsletters, occasional publications and journal through office reps to members in the workplace, etc.

Performance objective for number 1. immediately above (Conduct induction meetings for new members):

The organiser must be able to negotiate and schedule a workplace meeting for new members so that all new members attend... and must be able to conduct the meeting in a way that ensures that all new members are fully aware of their union rights, of the facilities and benefits provided by the union, and of the ways they themselves can play an active part in the affairs of the union.

The process leads to an exhaustive identification of competencies - that is, the elements of the job that must be done well for the job to be successful - and the writing of performance objectives that include details of the activity, the conditions under which the activity is to be carried out, and the standards that must be met. Once performance objectives are written, then the trainer can design courses and other kinds of learning program based around clusters of competencies and aimed at helping the learner achieve the level of performance laid down in the objectives.

Hierarchy of learning responses

In discussing how to structure training, Field outlines the following hierarchy of responses:

- *respond to an individual cue;
- *perform a sequence of steps;
- *discriminate between different things;
- *and make common responses to different circumstances or information.

Field gives examples related to the training of an operator on a production line. But we might use his hierarchy to help design and structure the training of a workplace representative.

Responding to an individual cue: One of the 'jobs' of a rep is to handle members' grievances. The normal cue is when the rep is approached by the aggrieved member, and we might build a section of our training program around this, discussing the likely mood of the member and ways in which the rep should react, and devising a brief role play to practise dealing with the situation.

Performing a sequence of steps: Dealing with a member's grievance involves a number of steps - interviewing the member to get the facts, preparing your case, meeting with management, and reporting back to the member. Each of these 'competencies' in turn involves a sequence of steps. For example, interviewing a member involves choosing a suitable time and place, preparing for the interview, putting the member at ease, explaining the objectives and the process of the interview, conducting the interview, taking notes, checking over the notes with the member, telling the member what you will do next. To help participants in the course learn to follow these steps we might draw out the sequence in discussion with the group, use a case study or a film, and practise the sequence in a role play.

Discriminating between different things: Grievances, however, can be many and various, and reps need to learn to discriminate between grievances arising from bureaucratic inefficiency such as errors in pay for overtime done, breaches of the award such as legitimate entitlements for training leave being withheld, departures from local custom and practice such as the sudden removal of a microwave oven from a crib room, harassment of a particular worker by a supervisor, discrimination against a worker because of gender or ethnic origin, etc. We might help participants develop their ability to discriminate through discussion and getting them to work

through a list of one-line examples of grievances in groups to develop their own categories of grievance.

Making common responses: And reps will have to use their skills in handling grievances in response to a number of different circumstances and to differing kinds and quantity of information. The grievance may be an individual one, or one shared by a group. It may be related to a one-off event or be a continuing and festering situation. The information may be complete and the issues clear cut, or the information may be suspect, and the issues complex. To develop participants' skills in handling grievances to a higher level, we may have to devise a number of widely differing case studies and role-plays and work through them, encouraging the participants to respond flexibly and inventively.

Real and unreal worlds

Field, like the other mechanistic writers on adult education and training, can make interesting reading. There is something seductive in the models they offer. But we need to beware. By locking ourselves into procedures that are marked out in hierarchies, chronological steps, taxonomies and typologies we can easily lose the sense of adventure, the creativity, the potentially revolutionary aspect of the act of helping others learn. We are in danger of creating unreal worlds where order is believed possible and originality unwelcome, where human activity, people's lives, workers' dreams and aspirations are defined in terms of 'need' and 'competency'.

This danger is even greater as we move into the mid-nineties. Competency-based training and assessment are all the go. Federal and state governments promote them. As part of the process of restructuring awards, reclassifying work and developing career paths, jobs across industry are being described in terms of competencies. National bodies are using the concept of competency to validate training, and to develop ways of assessing people coming into the country. Efforts are being made to apply competencies to the description of professions such as nursing, law, medicine, engineering, and teaching (Gonczi, Hager and Oliver, 1990; Gonczi, 1992). And efforts are even being made to write competencies so as to encompass abstract attributes such as attitude and value.

Clearly there are advantages in designing training with competencies in mind. A number of problems associated with traditional 'front-end' apprenticeship-style training are solved. The emphasis is shifted from the time served in training to the outcomes. This permits training to be delivered in a whole range of different modes.

With different modes available, trainees can proceed at their own pace and choose their own paths. And if people are assessed according to the competencies they can demonstrate rather than the courses they have successfully completed, then they can gain recognition for their prior learning, irrespective of whether that learning was done through formal training, informally on the job, or in the course of some entirely different kind of experience.

There is, however, an irony in all this. Calls for the reorganisation of work are often couched in holistic terms. Enterprises are urged to reject Taylorist hierarchies and demarcations of work and to become learning organisations in which the workforce is made up of fully developed, adaptable, multi-skilled people capable of exercising initiative and working creatively in teams. Yet the response by educators and trainers to these calls has been to develop a form of analysis that involves the fragmentation of work into jobs and then into competencies and then into elements of competencies. Once this is done, the temptation is to design training that is narrowly focussed on getting the trainees to develop each element of each competency in turn, ticking each off as they go. Competency-based training in this form can look very like a return to, rather than a rejection of, Taylorism and scientific management.

Donald Schon in his *The Reflective Practitioner* warns against relying too thoroughly on orderly, 'technical' solutions when he says:

... [T]here is a high, hard ground where practitioners can make effective use of research-based theory and technique, and there is a swampy lowland where situations are confusing messes incapable of technical solution. The difficulty is that the problems of the high ground, however great their technical interest, are often relatively unimportant to clients or the larger society, while in the swamp are the problems of greatest human concern (Schon, 1983, p.42).

Tyler, Houle, Knowles and Field (and those currently writing about competency-based standards for assessment and training) have a lot to offer the union trainer, but we need to temper their influence with the ideas and practice of adult educators who dare to venture into the swampy areas of personal and political development, and who see learning as a process of gaining power.

Chapter 15: Aims and Objectives

I want to discuss one more mechanistic writer. His name is Robert Gagne, and his concern is less with the overall design of curriculum and more with the organisation of learning within a single program or course. I want to get to him, however, by describing the development of a particular course for a particular union.

AIEU Field Officers' Course

In 1989 I was approached by the Australian Insurance Employees Union to design and conduct a week-long residential course for their field officers. The AIEU has now amalgamated with a number of other unions to form the Finance Sector Union, but in 1989 it was the major union in the insurance industry covering some 27,000 members employed by insurance companies, loss adjusters and insurance brokers. The AIEU was a national organisation with branches in most states, and the term 'field officer' was used to indicate those officers in state branches, usually organisers but in smaller branches the state Secretary as well, who worked in the field, visiting members in their workplaces, taking up members' issues with management, and dealing with individual members' grievances either directly with management or through the industrial relations commission.

The approach came from the national office, and I flew from Sydney to Melbourne to meet with the National Secretary, the Assistant National Secretary and the National Resource Officer - in effect the three most influential figures in the union. At this meeting I was given my marching orders. I was told that one or two sessions in the course were to be given over to a discussion of current issues and an updating from the National Secretary on certain policy changes, but that these 'business sessions' were to be kept to a minimum and that I was to design a course concentrating on the skills field officers needed to perform their jobs effectively.

My visit to the national office coincided with a meeting of the national field officers' committee, and I met with the three organisers and two state Secretaries on the committee and discussed the brief I had been given by the national triumvirate. Skills it had to be, but would I be teaching my grandmother to suck eggs? The union did not have a rapid turnover of field officers, so most of the them would have been in place and successfully performing their jobs for a number of years. Some of the committee shared my fears. Others felt they could benefit from the course if it involved opportunities to share techniques and strategies, and to practise and refine

them in a controlled environment. All right, but what skills should be included? We drew up a tentative list, and I suggested that in order to help me make a selection directly relevant to their daily practice I accompany one of them for a day in the field.

Back in Sydney I conferred with an organiser of the NSW branch and began the process of conducting a task analysis. We discussed what duties and tasks his job involved and the skills he needed to perform them effectively, and then fixed a day when I could 'shadow' him.

A day in the field

We met at his office at 8.30 a.m. He was already at work, dealing with correspondence. We left the office shortly after 9.00 and travelled by train to a suburb on Sydney's north shore. There we visited the offices of a large insurance company and the organiser conducted two meetings. These were annual meetings with members at which he briefed them on the progress of various aspects of wage claims and negotiations on award restructuring, told members of improvements in their union controlled superannuation scheme, fielded questions, and called for information and discussion on any local workplace problems or issues. Management cooperated by providing the company's training room for the meetings, and two meetings were held so that attendance could be staggered and business in the office not halted completely.

There was not much discussion during the meetings but I was struck by the number of members who spoke to the organiser after each meeting, raising individual queries or grievances. The organiser listened attentively to each person, carefully noted down their concerns and outlined what action he would take.

From these meetings we went to another office in the same suburb. The office was in dispute with management over a question of rostered days off, and members had called a stop-work meeting some days previously at which a resolution for a 24 hour stoppage had been passed. The organiser met with two office representatives over a quick lunch in a snack bar.

I watched and listened as the organiser questioned the two reps on the morale of the members in the office, and on the kinds of action management had taken since the stop-work meeting. The reps reported that the resolve of some of the members had weakened. The organiser listened hard, then through careful questioning and some comment, helped the two reps identify the range of options open to them and

their members. The reps decided to recommend to their members that they wait for results from national moves to restructure the award before calling the stoppage.

We moved on to another office, this time of a loss adjuster, which had a staff of three. The organiser had contacted the firm and asked to meet with the staff with a view to recruiting them into the union. He had had to insist on his legal right to do so and the manager had chosen to be absent when we arrived, giving the union, as we thought, unfettered access to the staff. The organiser talked to the three staff, outlining the union's role and the benefits of joining. Two showed interest, particularly in a recent pay rise in the industry that appeared not to have been passed on to them, but their interest was expressed in an oddly muted way. The third member of staff had not moved from behind her telephone console and had contributed little. When the organiser addressed her directly about the pay rise she had not received, she suddenly announced, in a state of some anger and confusion I felt, that she was the manager's wife. The organiser had some trouble controlling his laughter and cut the meeting short, but made sure that he left with addresses through which he could contact the two interested staff members privately.

From the loss adjuster's we went to the headquarters of another large insurance company for a meeting with new members. The organiser had a cordial relationship with the personnel manager in this company, and was regularly given access to the company's training room to meet new members of staff. The organiser explained the role of the union and the benefits of membership. For a number of people in the meeting, this was their first job and therefore also their first experience of being in a union, and the organiser had to answer very straightforward and basic questions about what a union was and the roles unions played in the social, economic and industrial life of the country - to play the role, in effect, of an educator.

We returned to the union offices in the central business district of Sydney. It was now about six and the organiser worked for another hour, recording the day and the decisions taken in relation to the dispute, expanding the notes of his conversations with members with individual queries or grievances, writing two letters, and listing in order of priority action that had to be taken the next day.

We ended by running over the kinds of role he had performed and the kinds of skill he had employed during the day, and left the office about 7.00 p.m. after, for the organiser, an eleven hour day. As we were parting, the organiser commented that there had been some talk of compiling a handbook for field officers, perhaps in a form that could be regularly updated. After a day focussing on the skills he was using in his field work he now thought such a handbook would be very useful indeed.

Designing the course

A decision had been taken by the union to hold the course. I had been given fairly clear marching orders from top-ranking officers, but had been able to check these and develop them with a committee representing the potential participants in the course. With the committee and then the organiser in Sydney I had been able to conduct an analysis of the job and duties of a field officer, and the skills needed to perform those duties. From all this I now was able to draft the following general statement for the course:

AIMS:

1. To develop further the skills needed in order to be effective field officers.
2. To develop further strategies for progressing the interests of the union's members and for strengthening the union.
3. To begin compiling a field officer's handbook.

SKILLS:

Conducting workplace meetings
Effective speaking and presentation
Managing people and solving problems
Recruiting new members
Informing, persuading, changing attitudes
Handling a member's grievance
Interviewing to get the facts
Meeting with management
Reporting back

METHODS:

Exchange of information and experience
Group discussions
Exercises
Reviews of exercises
Written summaries

Liaison was with the Assistant National Secretary. I let him have a copy of the above as notes and we used these as a basis on which to discuss how I intended constructing the course. From this point on I assumed complete control over the process. As the design developed I let the Assistant National Secretary have copies of the detailed session objectives, the exercises and finally the timetable I wrote, but did not receive any suggestions for revisions.

I had arrived at a list of skills or areas of activity to deal with in the course. My next step was to clarify and define these skills, and I did so by writing objectives.

Objectives

Training manuals tend to recommend writing objectives in a rigorous behavioural form. These describe the desired *observable behaviour* of the learner at the completion of the learning program that will indicate that she or he has completed the learning successfully; and state the standards that the learner's behaviour must conform to and the conditions under which that behaviour must take place:

By the end of this course participants should be able to key both verbal and numerical data into a company spreadsheet accurately for an unbroken period of fifteen minutes at a speed of ten entries per minute using a Macintosh IIfx and working from a hard copy document with easily legible font and layout.

In the context of union training these kinds of detailed behavioural objective will usually be inappropriate. They are training tools that reinforce the management model. They demand predetermined, uniform responses from the participants and discourage learning based on exchange and discovery. And they set up the trainer, or the writer of the objectives, as the authority, the arbiter and the person in control.

But if behavioural objectives are inappropriate, objectives of some kind are still needed since they serve as a statement of the contractual obligations all the parties in union training enter into. They let everyone involved - the trainer, the participants and the union - know where they are going. They state what the union can expect in return for its investment in the training activity. They describe what the trainer has undertaken to help the participants achieve. They let the participants know what they can expect to be able to do as a result of actively engaging in the training. And they provide a number of yardsticks by which the participants, the trainer and the union can evaluate the training.

Union training operates in a context that is a subtle mix of organisational control and participatory democracy, and the challenge is to write objectives that have some of the rigour of the behaviourists but which allow for variation and flexibility. I had observed the way the organiser talked with the two reps about their dispute, and how he had helped them clarify their ideas, identify their differences and areas of agreement, and then work through the options facing them and the members they represented. It seemed useful to set aside at least two or three sessions in the course to examine and develop these kinds of skill further. (I need also to admit that I saw a legitimate opportunity to build an extended part of a course around problem solving, in the way I described in an earlier chapter.)

I had described one of the 'skills' in the draft list as *managing people and solving problems*, and these were the aim and objectives I now wrote:

AIM:

To help participants develop their abilities to make people work effectively together in order to solve problems.

OBJECTIVES:

By the end of the session and exercises participants will be able to:

1. list different kinds of role people can adopt in groups
2. describe ways of getting people to work together
3. list the steps of a problem-solving model
4. apply the model to different kinds of problem.

I had tried to write the aim in the language of hopes and good intentions, and the objectives in a modified behavioural form, concentrating on observable behaviour such as *list* and *describe* but not including standards or conditions. These would be developed with the participants during the session and exercise. Clearly the objectives were minimal ones, a kind of checklist to let the Assistant National Secretary know what I was about and to help me begin building a session and an exercise on, but I had tried nonetheless to order them with Gagne's learning hierarchy in mind.

Chapter 16: A Hierarchy of Learning

Robert Gagne

Gagne's interest is more in observing and recording the conditions in which learning occurs than in trying to explain the learning itself. This concern with the circumstances surrounding learning and the observable outcomes of the learning makes his ideas attractive to educators and trainers in the mechanistic tradition, and his ideas on instructional design have influenced the development of competency-based training in industrial and military contexts and performance-based education in educational institutions.

Gagne considers words such as 'know' and 'understand' too vague and ill-defined to be useful in describing the conditions of learning; and argues that we can really only usefully describe the *actions* people will be able to perform as a result of learning, using words such as 'list', 'describe', 'state', 'demonstrate' and 'identify'. In arguing his case through, Gagne has had an enormous influence on the form in which trainers and educationalists express competencies and educational objectives.

But Gagne does not simply offer a number of formulae for writing objectives and designing programs of instruction. If this were the case then the union trainer would only be interested in his ideas in so far as they provided insight into the kind of behaviour-modification training that managements might want to use. Gagne's ideas are subtler and more flexible than that.

Gagne identifies different kinds of learning and arranges these in a hierarchy. At the lower end of the hierarchy are the kinds of learning that can be described and provided with the rigour and control of a behavioural approach. However, at the upper levels of the hierarchy are kinds of learning that involve discovery, inventiveness, adventure and perhaps even insight, and Gagne states that at this level learning 'should be thought of as a human activity...and not as a generic skill' (Gagne, Briggs and Wager, 1988. p. 66). Gagne's hierarchy of learning, then, offers the union trainer a framework for categorising and planning learning that may meet both the organisational needs of a union that requires certain behaviours of its members, and the needs and demands of the participants wanting their say as creative, active and individual human beings in that union.

At the lower end of Gagne's hierarchy of learning are basic kinds of learning, which he groups as *associations* and *chains*.

There are two forms of *association*. The first is straightforward conditioning in which we learn to make a standard response to a stimulus or signal. A car horn sounds as we are crossing the road. Our eyes swivel towards the source of the noise and we quicken our step. The second is stimulus-response learning in which we learn to change our response by discriminating between stimuli. We learn to respond in a particular way by being rewarded or getting favourable results. A child earns praise from the accompanying adult when she or he stops at the edge of the road and waits for the lights to change. The child learns to stop on red and go on green.

Chaining is the process of connecting together a number of learnt responses into a sequence. Gagne describes two kinds of chaining. The first is motor chaining - learning a skill such as riding a bike - and the second is verbal chaining - rote learning a regulation or a saying or the times table. 'Thirty days hath September...'

These kinds of learning are basic ones, so occur at the bottom of the hierarchy. But they are also kinds of learning that we engage in all the time and so can occur alongside other kinds of learning further up the hierarchy as well.

Gagne's hierarchy grows more interesting for the union trainer as we move upwards. What is more, Gagne argues that the kinds of learning lower down in the hierarchy form prerequisites for the kinds of learning further up the hierarchy. As a result, he provides a guide for the ordering of the learning we organise for others.

The next type of learning in the hierarchy is *discrimination learning*. This is the process in which we learn to discriminate between similar phenomena. The stimuli may resemble each other but we learn to identify the differences and respond differently to each one. So we learn to distinguish between a square and rectangle. And so in writing my objectives for the session on managing people and solving problems I started with an objective concentrating on looking at differences in the roles people adopt when coming together in organised groups.

It is impossible (for me, at least) to write an objective without also contemplating how we might achieve it. Here I had in mind opening the session with buzz groups and then a plenary discussion on horror meetings the field officers had been involved in. This would build up a store of anecdotes and mini-case studies, from which we could begin to identify particularly difficult types of people in small meetings or groups, then kinds of people who could make more positive contributions.

Gagne's next kind of learning in the hierarchy is *concept learning* which describes the ability to classify and link together similar phenomena or occurrences. Individual friends are individual phenomena while friendship is a concept.

Gagne breaks concept learning into two stages. The first is *concrete concept learning*, where we learn to form concepts based on direct observation of phenomena in the world around us. So we observe coins and wheels and form the concept of 'circular'. Other examples of concrete concepts are 'smooth' or 'underneath' or 'side'.

The second stage is *defined concept learning*, in which we learn to arrive at abstract concepts. Examples of abstract concepts are 'cousin' or 'city' or 'justice'. We cannot arrive at the concept of cousin simply by observing a number of cousins. We need to compose a definition that explains what makes these people cousins.

Still seeking to achieve my first objective for the session on managing people and solving problems, I intended asking the participants to work in syndicates of five and arrive at a limited number of categories of people they encounter in the groups they had to work with, and then in plenary compare these with some of the categories that certain writers on group dynamics have come up with. My aim was to get them to arrive at their own definitions of the kinds of roles their members adopted.

In writing my first objective for the session, then, I had in mind Gagne's discrimination learning, concrete concept learning, and defined concept learning. I will admit that there are vast differences between learning to distinguish between shapes and getting a group of seasoned union officials to think about the troublesome and less troublesome members they have to try to get to work together. But by drawing from Gagne I was able to write the objective and arrive at a sequence of activities designed to achieve it.

Next up Gagne's hierarchy comes *rule learning*. This describes the ability to respond to a class of stimuli with a class of performances. An example of rule learning would be when we can demonstrate the ability to write nouns in the plural. For Gagne, therefore, a rule allows us to behave in a consistent or regular way in the face of a variety of events or phenomena.

My second objective for the session was concerned with getting the field officers to examine and develop ways of encouraging people to work together. Here I had in mind showing a short video depicting three different union meetings in which problems occur and various strategies to overcome them are used; and in the discussion triggered by the video encouraging the participants to develop guidelines both for dealing with problem people and drawing them into the group process, and for making the group work more effectively. From the processes of clarification, classification and definition - in Gagne's terms, formulating concepts - we would now be moving to the processes of describing and analysing proven responses, and developing new strategies - in Gagne's terms, formulating and learning rules.

My third objective was concerned with developing a problem-solving model. In one of the three meetings in the video, the chairperson exercises a subtle but tight control over the group by guiding them through a number of steps. I had in mind taking the discussion on from ways of dealing with individuals to an examination of the model he used.

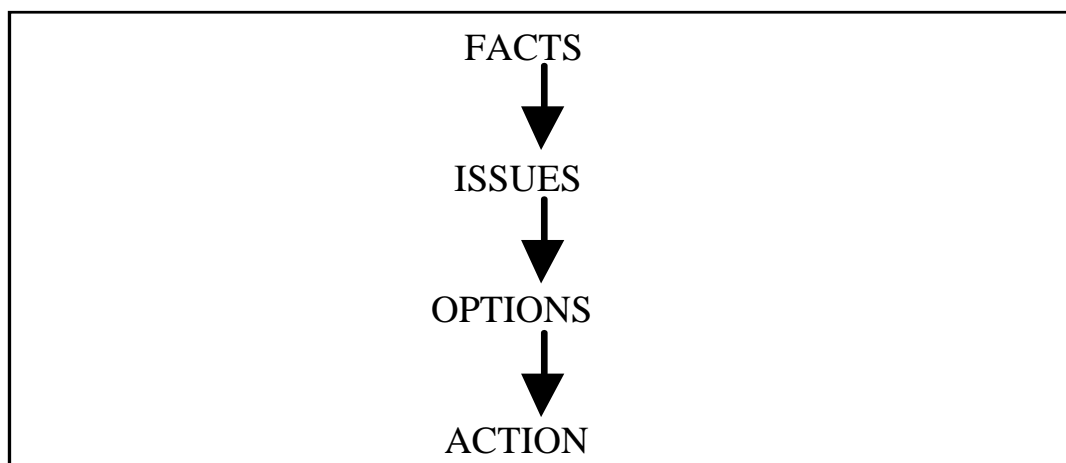
The model involves asking three questions.

The first is: What's wrong? To answer this we must analyse the problem, first by examining and clarifying the FACTS, then identifying the ISSUES that flow from those facts.

The second question is: What *can* we do? To answer this we must rank the issues in order of priority and then canvass all the possible OPTIONS for each of the issues.

And the third is: What *will* we do? To answer this we must choose the options that most effectively address the high priority issues - that is decide on ACTION.

This becomes a basic model, or agenda, for a group to follow:



In this process, to use Gagne's terminology, we would be engaged in defined concept learning and rule learning, and moving up the hierarchy to *higher order rule learning*. This highest kind of learning involves combining two or more rules in order to form higher order rules - that is, to devise ways of dealing inventively with the new and unexpected.

Rules describe the capability to respond in a regular way to varying phenomena and occurrences. Higher order rules describe the processes of bringing different rules together to deal with complex challenges. Here it seems to me that Gagne is trying to describe the process of imagination and invention. He argues that in dealing with a new and unexpected problem a higher order rule emerges which becomes part of the

learners' repertory, so that the next time around the problem can be solved more easily.

For the trainer, the process of taking participants from rule learning to higher order rule learning will mean providing them with exercises in which they are challenged and encouraged to formulate their own responses. To do this I wrote a series of four problems, which I intended getting the field officers to work on in groups in order to test the problem-solving model, and then to develop and extend it.

This is the first problem:

Nancy, a longstanding member of the union employed at General Erehwemos Insurance, rings you. She has been there more than ten years, is in her early thirties, and is an amiable, easy going, sometimes outspoken person. She appears to have no career aspirations at all and you believe she devotes a lot of her leisure energies to hang-gliding. She has always attended workplace union meetings but has done nothing else for the union. As far as you know she has always done what was expected of her as a computer keyboard operator. She now tells you she has been summarily dismissed by the General Manager for whistling in the lifts. She is ringing you from home, having told the General Manager 'a thing or two' and then stormed out. You are surprised at the General Manager's action. Nancy says could you please get her job back for her.

My intention in writing the first problem was to provide an opportunity for the field officers to practise using the model and, in the debriefing, to arrive at their own conclusions as to its usefulness. From there I would ask them to tackle the second problem:

You have a feeling that things are slipping out of control at General Erehwemos Insurance. You have one office rep who is away on extended sick leave and another who has left the firm without letting you know. Nancy, whom you recently got reinstated, says she would like to be office rep. The firm's Training Officer has acted unofficially as your representative by passing information to you but says he is 'too close to management' to be a rep. You sense trouble brewing at General Erehwemos Insurance and need to have the place well organised.

In debriefing this second problem, my hope was to draw from the field officers the conclusion that a problem-solving model concentrating on facts and issues as its starting point was in danger of ignoring the people involved. Perhaps in our analysis

we needed to look at the various parties, their allegiances, their interests and the kinds of position they might already have adopted in relation to the problem.

This discussion would lead to the third problem:

Something is wrong with the General Manager. He used to be a reasonably quiet, unassuming man who cooperated with you in a vaguely disinterested way. Now he has tried sacking Nancy, has rung you angrily about a workplace meeting that ran overtime, and is saying he wants to be consulted about the appointment of any new office reps.

My hope was that in debriefing this third exercise we would begin talking about problems that derive from people's sense of pride, from people's perception of themselves and their need for recognition, from a mismatch between the kinds of responsibility a person is expected to take on and the status they are accorded.

My intention was to work through these first three problems reasonably quickly as a preparation for an exercise dealing with the fourth problem. The first three problems were inventions, but now I wanted create an exercise in which the field officers would practise analysing a problem much closer to home.

Gagne and beyond

I chose as the basis for this fourth problem the dispute I had seen something of on the day I shadowed the organiser in the field. By drawing on the dispute but altering some of the details, I tried to write a problem that was close enough to reality to draw the field officers in, but sufficiently different to permit them to analyse the problem freely.

This is the problem I wrote:

Nancy is now the office rep at General Erehwemos Insurance. Getting her elected excited the interest of Jim, an odd character with an excitable way of talking. Some people tend to think Jim is a bit of a fool. Jim wanted to stand for office rep alongside Nancy but you dissuaded him by saying he was too young. To soften the blow you asked him to help Nancy on an informal basis if she asked him.

Getting Nancy elected also reawakened interest in the union at General Erehwemos Insurance, and the membership, egged on by Jim, began a campaign for a rostered day off. You were instructed to approach management and when they refused to discuss the matter a stop-work meeting was held at which a motion was passed unanimously calling for a 24 hour stoppage if management continued to refuse to talk.

The General Manager, encouraged by his new personal assistant (who has an American accent), stalled his response for four days and now into the next week has refused to negotiate.

Nancy feels unsure of her membership. She thinks the steam may have gone out of the campaign and she has asked you to meet and advise her. Jim is still whipping up a small group of about eight members and you realise they will be very disillusioned and negative if the campaign is abandoned with no gains at all.

In writing these problems I was moving on from Gagne. My objective for this part of the course had read: By the end of the session and exercise participants will be able to *apply the model to different kinds of problem*. By writing the four problems and getting the field officers to work through them, I would be able to help them achieve that objective. But my intention was to do more than that. My hope was that in the course of working through the problems we would move on from the mechanical nature of the model outlined above and begin developing variations, discussing human nature, discussing ourselves, and examining ideas, ideologies and values and how they affect the decisions we make. In other words, my hope was that learning of another order altogether would happen.

Gagne is useful in providing methods for formulating objectives, and a hierarchy of learning to use in planning a progression of learning. He is useful in getting us to the point where we set the exercise running but he does not offer much help when we begin the debriefing. And it is in the debriefing that the magic can happen. This is where people, emerging from the heightened experience of a role play or a simulation or the intensity of an unsupervised small-group discussion, may make significant discoveries, where 'windows' may suddenly open, where insights can occur, and where the trainer has to be ready for outcomes she or he cannot anticipate.

In writing the week-long field officers course, General Erehwemos Insurance took over and I ended up with a rolling scenario set in this fictional workplace that would require the field officers to run meetings, make formal presentations, deal with problems, combat union busting manoeuvres from an American interest in the firm, recruit new members, handle grievances and, following a board room defeat of the American interests, negotiate a whole new set of agreements with management. The course was built around a pattern of sessions, each with a set of formal aims and objectives in which I would lead discussions, facilitate exchanges of ideas and strategies, and provide some input myself; exercises in which the field officers would enter or re-enter the General Erehwemos Insurance scenario to deal with the next

set of developments and challenges in the story; and then detailed periods of debriefing in which we would review the exercises and take our learning wherever it led us. My hope was that in the debriefing we would move beyond Gagne's different kinds of learning into the realms of discovery and insight.

It is difficult to describe discovery and insight in terms of standards, conditions, and measurable outcomes. Gagne does not really help us here. If we are going to examine ways of encouraging this kind of learning in union training we need to move on from the mechanistic mob, and look at what the psychotherapy and community development traditions have to offer.

Part Five: From Psychotherapy

Chapter 17: Working with Groups

Adult educators drawing on the psychotherapy tradition are normally concerned with helping people achieve 'personal growth' or 'self actualisation'. To do this they make extensive use of experiential learning techniques such as group-work, simulation and role play in order to help learners gain insights into themselves and so improve the way they relate to others. In this kind of teaching and learning, the source material is the lives of the people gathered together in the group, and the job of the educator is to help the learners recognise the significance of their own experience, examine and understand it, and then use that new understanding to live more complete lives. The educator's aim is to help each learner become a 'fully functioning person' (Rogers, 1983).

Group dynamics

These kinds of adult educator draw from the fields of group dynamics and therapy based on the encounter group. People come together and under the guidance of a leader or facilitator are encouraged to interact in an intense and sometimes cathartic way that encourages self-examination, discovery and, sometimes, personal change.

Already there is material here for the union trainer. Most union training involves bringing members together to learn in groups, and an understanding of the ways groups work will enable the trainer to help these groups learn more effectively. Further, most union action is group action, so a knowledge of group dynamics and group processes may help the trainer understand and interpret the union as an organisation better. And group dynamics will in itself constitute a body of knowledge and a set of skills that the trainer should pass on to the participants to use in everyday union activities. An understanding of the ways groups work may, for example, help a union negotiator both coordinate her or his own team, and understand what is going on in the other side's team.

I need to be careful here. I am not suggesting that union trainers engage in therapy or set up encounter groups, simply that we can do what other adult educators and trainers have done, and learn from the field. For example, a collection of readings prepared for adult educators includes a piece by Carl Rogers on encounter groups, and the editor comments that, 'despite the fairly narrow focus, the

stages in development of a typical encounter group that Rogers identifies ... are applicable to other kinds of groups' (Tight, 1983a, p. 201).

Writing in a style wonderfully free of jargon Rogers (in Tight, 1983a) describes how encounter groups can begin in a state of doubt, confusion, and resistance; how at the outset people usually describe past feelings; how the first expression of current feelings are often negative ones towards the group or the leader; how these emotions can be replaced by a period of personal exploration and the expressions of interpersonal feelings in the group; how individuals begin to talk frankly about themselves, allowing their facades to fall away; how the group responds with feedback, in the forms of both confrontation and support; how basic encounters occur between members of the group in which strong associations are made and relationships established; and how there can follow a productive and very positive phase of exchange, mutual help and personal discovery leading to real change in both the group and the individuals.

Union training can involve intense encounters between members, and an acquaintance with Rogers' phases will sometimes help the trainer understand what is happening in a group, and may help the trainer anticipate ways in which courses might develop. It can be reassuring, for example, to realise that a period of resistance and negativity may be a fairly normal stage that has to be passed through on the way to forming a group. Equipped with this knowledge the trainer may deal with the criticism less defensively and manage the adjustments to the course and the transition to the next stage more effectively.

Much of Rogers' analysis, however, is too detailed and his phases may not be appropriate to a group where the examination of personal feelings is not a central item on the agenda. Here, like other adult educators and trainers, we need to draw on the analyses of people like Rogers but simplify them for application to groups of people aiming for something other than their own personal development. Writers like Tuckman (1965) and Heron (1989) see groups passing through four or five 'more obvious' phases. Tuckman gives us a popular terminology for these phases - forming, storming, norming, and performing. Some people add another to his list - mourning.

Group dynamics and union training

Groups of participants in union training can, and often do, pass through a number of phases, and I will use Tuckman's terms to denote them, but draw a little from both Rogers and Heron as well:

Forming. Certainly in the early stages of a course there is a lot of uncertainty and anxiety - 'milling about' as Rogers describes it. Some people will keep to themselves. Others will make contact enthusiastically. If the course is for members or officials from a number of unions, then some participants may be suspicious of the politics of other unions represented there. If it is a single union course, members may nonetheless come from different workplaces, or factions. There will be barriers, some put up by the participants themselves and others endemic to the union movement, and the trainer will need to use forms of introduction that overcome them.

Rogers provides a clue in his identifying that people tend at first to express *past* feelings. The trainer can probably fairly safely get participants to present themselves and so provide identities to which others can begin relating naturally by asking them about their past experiences as members or delegates. This safely focuses on matters participants know about, and allows them to talk about themselves in terms of finite, practical achievements. It may also allow the more open of the participants to talk about successes and failures, secure in the knowledge that they are talking about events (and feelings) that are over and done with.

The trainer's job here will be to draw out common or similar experiences and so help participants develop a sense of unity. Union trainers tend to open their courses with introduction exercises that require participants either to say who they are in turn, or say something about their expectations of the course - that is, to think and talk about the present or the future. If we take notice of the theory about the forming stage in group dynamics then perhaps we should start by getting the participants to think and talk about what they have done in the past.

Storming. Rogers alerts us to the fact that some of the first really open expressions of feeling in a group that is beginning to form may be negative, critical perhaps of other participants, of the process, or of the leader. The union trainer needs to be ready for this. Once the group has formed sufficiently to move on to the substantive matter of the course, we should not be too surprised if our methods are questioned, if there is some initial resistance, and if some tensions between participants emerge.

In a short and reasonably tightly structured course, any resistance will probably only be minor, and will probably be easily dealt with by quickly and simply

recognising it. 'One or two of you look a bit doubtful about doing this exercise. Do you want to talk about it?'

In longer, more intense courses blow-ups can occur. People can confront each other and strong exchanges can take place. Sometimes the trainer and the course will be the subject of hostile criticism. This may not happen, but the trainer needs to have time available to deal with it if it does. He or she needs to let participants who feel under pressure, who are having trouble working together, who are finding that learning in the company of others involves tensions, antagonisms and challenges, have the freedom to express their worries within the group as a whole. In some union training courses space for this to happen is set aside and designated in the timetable under some such heading as 'clearing house' or 'course committee'.

Norming. In this phase the group begins establishing a 'culture' of its own. Rogers suggests that an important phase in encounter groups occurs when people begin accepting themselves as they are, when they begin dropping their facades and so can begin giving and receiving feedback from others.

In a less intense or personal way, this phase can occur in union training. Ways of relating become real ones, participants begin interacting genuinely with each other as unionists rather than representatives of a particular viewpoint or of one particular union. Participants respond openly to each other, will confront each other with rigour but without rancour, and will help each other. Norms are established. Participants adopt particular roles within the group that are right for them and acknowledged by others. In this phase the trainer can begin taking risks, recognising and using the particular roles participants have taken on, and employing exercises that require application and a climate of trust.

Performing. Heron describes this as 'the stage of authentic behaviour'. This is the phase in which the group performs effectively, using the various strengths and qualities of the individual members.

There is an openness to self and others, risk-taking, working, caring and sharing. There is flexibility in moving between different strands of learning. Leadership is shared, with a good balance of hierarchy, cooperation and autonomy (Heron, 1989, p.26).

Rogers sees encounter groups reaching a phase where 'basic encounters' - real exchanges - take place and there is 'the expression of positive feelings and closeness' leading to a change in behaviour.

I was responsible for organising and working with another trainer on a five-day residential course dealing with occupational health and safety. There were twelve participants. Several were from white-collar unions. Two, one a technician and the other a clerical worker, were from telecommunications unions. And four were union members of an occupational health and safety committee in a large state railway workshop. These four were very vocal about being very blue-collar.

Of these four railway unionists, two worked in the workshop foundry, and the other two in an adjoining machine shop. Three of them were extremely big men. The fourth was small, thin, almost to the point of looking anorexic.

The three big men closed ranks protectively around the small man. They were obviously good friends, activists in the same union and same workplace, and proud of their intimate contact with the heat, the grit, and the danger of hot metal. The big men were outgoing and cheerful, the small man wry and accessible, but they were a formidable group made more exclusive by their assertions that they knew what occupational health and safety was really about.

The white-collar unionists got the message early on. The kinds of hazard they might deal with - the slow, debilitating effects of some kinds of clerical work, the unseen dangers of some kinds of office environment, the vexed and disputed pain of repetitive strain injury - did not match up to the immediacy of the roar of the furnace. The telecommunication unionists sought alliance with one group then the other but were rebuffed, and the course rapidly developed deep divisions.

Amiability dissolved on the morning of the second day. The course was criticised. Some participants did not see how the course could work with interests so varied. The material we were providing was too general. The telecommunication unionists said they were getting nothing. Attention shifted from the course to the participants. The white-collar unionists were accused of not mixing in the bar after the evening session. Someone suggested that the four railway unionists had come to the course together as a kind of holiday. No way, they replied, they were attending all the sessions, weren't they? Yes, but were they trying to learn anything? All they seemed interested in doing was telling everyone else how well organised their safety committee was.

The lead came from the youngest of the railway unionists. All right, the hazards might be very different but the skills involved in dealing with them, taking concerns to the boss and managing the committees were the same wherever you worked. If the course dealt more with skills like these, there would be more in common. The other

three agreed, and implicit in their agreement was an undertaking to speak less and listen more.

My co-trainer and I undertook to adjust the course and place greater emphasis on the skills of hazard identification and negotiating change; and in the exercises that followed participants made efforts to examine their different approaches and to identify where blue-collar and white-collar concerns overlapped. The course rolled forward with the group finding a lot of common ground in a session on the Wednesday morning led by a doctor and dealing with the effects of different kinds of work on the human body. Thursday afternoon was given over to an exercise involving negotiations over short and long term responses to hazards, and teams made up of blue-collar and white-collar unionists worked together in the college library to research a number of hazards and then prepare and present their cases for change to the two trainers playing sceptical management representatives on an occupational health and safety committee.

At the end of Thursday afternoon, with the course nearly over and the afternoon's exercise successfully completed, the group was in high spirits. The railway group approached me suggesting that I accompany them and some of the others for a swim in the college pool. I had just been playing management and there was something about their invitation that made me hesitate. Was the small one in the group going into the pool? No, he said emphatically, not with three blokes their size. What is more, he said, now that he was fully clued up on occupational health and safety, he advised me against it too.

Mourning. Some writers on group processes identify a final phase as members in the group face up to the fact that the group is drawing to a close. Some anxiety may return, and some members may slip back into a kind of defensiveness. People who have worked closely together with the barriers down have to accept that this experience is ending. For some this may be difficult and, unless the leader recognises their anxieties and provides opportunities for them to express it, they may respond to the approaching end of the group with a kind of negativity or resentment.

In union training, participants may begin adopting once again the attitudes of the union, faction or political grouping they will be returning to, and divisions that were evident at the beginning of the course may reappear. The trainer will have to help the group recognise what is happening and prepare participants for their return to their workplaces and union activities in a way that lets them carry away what they have learnt. The group is disbanding and will not come together again, so participants need to be given an opportunity both to review the experience of the course,

celebrating what was a group activity, and to look forward to what they will be doing as individuals.

John Griffith would reach the end of his courses with the walls of the training room festooned with butcher's paper carrying summaries of discussions, diagrams, drawings, results of brainstorming sessions, quotations, and lists of met and unmet expectations - what he described as the artifacts of the course. As part of a closing ceremony he would ask the participants to go round the room looking at this tangible evidence of what they had done during the course; then he would ask them to remove the paper and restore the room to the condition they had found it in on the day they arrived; and finally he would ask them to return to their seats and reflect in silence and perhaps in brief discussion on what they as individuals would take away.

Chilla Miller used a diagram which he drew on the whiteboard to close his courses for workplace representatives. The diagram showed the membership in a workplace and in different relationships to them a number of different kinds of workplace representative - those who behaved like some little god issuing commands to their membership, those who behaved like menial servants and simply responded to their membership's every bidding, those who trailed unimaginationally behind their membership and those who were out in front wanting to lead their members into a new political dawn.

Chilla would remind the participants that they might be all fired up as a result of the course but that their members back in their workplaces would not have had that experience and would be unchanged. Re-entering the workplace might be difficult and they would need to think very carefully about the roles they adopted. 'Which kind of rep will you be like?' Chilla would ask, and then drawing and redrawing the diagram, crossing parts out, adding new categories, he would lead a discussion that deftly revisited the course and then focussed the participants' minds firmly on their immediate, and individual, futures.

Groups do not always move through all four or five phases. Nor do they have to in order to be successful. It is not impossible for a group to remain in the storming phase and yet work through a process with the participants learning a great deal. Some would argue that a level of continuing conflict can put participants on their mettle and so make some groups particularly effective. Some groups never complete the norming phase and it could be argued that few groups ever get to a perfect performing phase. Nonetheless, this kind of analysis provides a framework for understanding how a group might develop, and gives the trainer a guide as to when

he or she might intervene either to help the group move forward or to encourage the group to hold back until a particular phase has been more effectively achieved.

Chapter 18: Experience and Reflection

Both Griffio and Chilla used exercises towards the end of their courses designed to encourage reflection. In the last decade adult educators drawing on the psychotherapy tradition have placed considerable emphasis on reflection. A major function of the adult educator, they argue, is to create suitable conditions in which the learner can reflect constructively, either on past experiences in his or her life or on experiences generated in the training room through various kinds of exercise.

Techniques to encourage reflection have been developed, refined and written about by adult educators such as those collected together by Boud, Keogh and Walker (1985), Weil and McGill (1989), and Mezirow (1990). These techniques include *individual activities* such as autobiographical writing, keeping learning journals, and mind mapping; *pair work* such as interviewing and active listening; *small group processes* such as buzz-groups, small group discussion, guided discussion, 'snowballing' discussion, assumption analysis triads, and nominal group process; and *structured exercises* such as games, simulations and role plays.

Again there is material here that can be used by union trainers. Of course we may judge that some of the techniques are too close to therapy or too concerned with the individual to be of use in a union training context. Autobiographical writing might be one of these. Others may not suit a particular union's culture. Nominal group process, for example, might be too structured for unions with a tradition of free-for-all discussion. And yet others may seem too complex to apply in a course where time is limited and the focus is on taking action. Mind mapping, for example, might be one of these.

However a number of these techniques are straightforward to use, and have the potential of adding another dimension to the participants' learning. For example, having participants keep a journal during a course, not of the events, but of the significant moments of learning, can heighten their whole experience of the course. Placing people in pairs and asking them to listen to each other in turn without any interruption for a fixed period of time can produce considerable 'raw material' for the participants, both as individuals and as a group, to draw upon. The attentive silence of the listener can become a kind of vacuum that the speaker fills. Experiences and ideas flow. Follow this exercise with a period in which each interviews the other in turn, and the spontaneous flow of ideas is reviewed and given form and meaning. Or place participants in pairs to discuss a particular issue, then join those pairs into fours to review their thoughts so far and take the issue forward, then join those fours

together into eights to review again and take the ideas further - a process some people call snowballing - can achieve a high level of collaborative and creative thinking.

Role play

Union trainers already make use of certain experiential learning techniques. Many, for example, will make regular use of buzz-groups and small-group discussion to help participants reflect on their roles and their practice as union activists. And many will conduct role plays.

In the first chapter of this book I described the conducting and debriefing of a negotiation exercise. A good role play is normally constructed around a critical incident in a recognisable story. The story provides the participants with a background they can quickly understand and that has relevance to them and their own experiences. The critical incident is an event - the sacking of a member, a breach of award conditions by management, the introduction of a new piece of technology into a workplace, a move by government to change key sections of industrial relations legislation, etc. - that requires the participants to take some kind of action.

A truly *critical* incident usually presents the participants with a number of dilemmas. No single action will resolve all the problems. Short term solutions may produce long term problems. Not all conflicting interests can be easily met. Participants in this kind of role play, therefore, are placed on their mettle, stretched, tested, forced to search for solutions, make decisions, argue and justify their arguments.

Role plays provide experience in a heightened and controlled form. The experience is heightened by the artificiality of the context. The participants know they are 'playing' a role, that they are being observed, and that they will review what they have done afterwards. To some extent they are watching themselves. The experience is controlled in that events and time have often been compressed, details have been simplified, and there is a beginning and finishing time. Despite the artificiality and the control, if an exercise is well constructed participants get caught up in it and act and react with intensity and a powerful mix of calculation and spontaneity.

A role play is written with the purpose of creating experience that can be turned into learning. And it is in the debriefing that conscious learning takes place. This is

the most challenging phase for the trainer. Participants can come out of a role play elated, excited, full of laughter, talk, congratulations and recriminations. The trainer must be able to intervene to begin helping participants make sense out of confusion. She or he must be ready to exploit the moment, pick up on a throwaway remark, ask the right question, encourage comment. Gradually the trainer will need to exercise more authority, to encourage participants to reflect on what they and others have done, and to help them give meaning to the experience. Finally the trainer will have to take control, to round up the discussion and locate what has been learnt in a framework that meets the course's and the union's objectives.

Interventions

Most adult educators drawing on the psychotherapy tradition are concerned not so much with the delivery of learning or designing learning programs as with the *facilitation* of learning. They may set up a situation in which learning through reflection or group interaction can occur, but their real skill is in helping the process of discovery by listening, offering encouragement, and intervening at crucial moments with questions or comments or additional exercises that will take the learners further. As a result of this emphasis on facilitation, the psychotherapy tradition in adult education is rich in ideas and processes to help the union trainer develop her or his skills in debriefing exercises.

For example, Heron (1986) provides a set of six strategies which he describes as interventions. These interventions are clearly drawn from the world of counselling, but Heron offers them as strategies for educators and trainers to use as well. The interventions fall into two groups of three: - *authoritative* interventions and *facilitative* interventions.

The three *authoritative* interventions are prescriptive, informative and confronting interventions.

A prescriptive intervention is one where the trainer directs the behaviour of participants. He or she may do this by issuing an instruction, or more subtly by suggestion, apparent consultation, example or challenge, but in each case the trainer's aim is to get the participant to do his or her bidding. 'Describe what happened.' 'I always quote paragraph 15, sub paragraph 1 from the Act. That usually gets them.' 'I bet you can't reach agreement in the next twenty minutes.'

An informative intervention is one where the trainer gives participants information or interprets the meaning of a situation or event. This may seem obvious

but during the debriefing of an exercise the trainer may be able to intervene with a fact that takes the discussion forward: 'Let me tell you what ACTU policy says on equal employment opportunity'; or an interpretation: 'You went all out to get even with them'; or a generally accepted statement: 'Managements always have trouble giving up authority'.

A confronting intervention is one where the trainer challenges the attitudes or behaviour of participants that may have been limiting their effectiveness and of which they may have been unaware. The purpose of this kind of intervention is, so to speak, to wake the participant up. 'Gay men and lesbian women can be unionists too.' 'She was the leader of your negotiating team but you kept speaking over her.' Confrontation produces shock. In the informative intervention - 'You went all out to get them' - the participant would not have been shocked. But when confronted about speaking over the leader, the participant is likely to be shocked since the trainer has judged that the participant was unaware of his or her behaviour. Obviously confrontation needs to be used carefully, particularly in matters that relate to the values of the person confronted, but used with humour and respect in a climate of trust this kind of intervention can be an excellent prompter to reflection.

The three *facilitative* interventions are cathartic, catalytic and supportive.

A cathartic intervention is used to help people express emotion. For the counsellor or therapist, cathartic intervention is about helping a client discharge painful or distressful emotions such as grief, fear, embarrassment or anger that distort the client's behaviour. The trainer, however, will use this kind of intervention at a less personal level to help participants 'let off steam', release tension, express disquiet or anxiety about the learning, and perhaps voice displeasure at the process or at other participants' behaviour. In a debriefing, for example, it may be necessary to get participants to discharge their tension, their dissatisfaction with their own performance, their irritation with other participants during the role play, or equally their pleasure and sense of victory, before any serious reflection and learning can take place. Often the trainer can trigger a free-flowing, cathartic discussion with a simple question like: 'Well, what happened?' But sometimes he or she will have to intervene further, perhaps by encouraging laughter in order to deal with any embarrassment, then with comments and questions to encourage the expression of other emotions. 'But how did you feel when your team began disagreeing with each other in front of the management reps?' or 'Did you like being put on the spot like that?'

A catalytic intervention is used by the trainer to encourage and develop self-direction and self-discovery in the learner. It is this kind of intervention that most obviously promotes reflection and gives that reflection a direction. Catalytic interventions may be in the form of a question. 'Well, why did you have trouble reaching agreement?' 'Can anyone else explain?' Or an instruction. 'Think about the roles each of you played and tell us how they differed.' 'Say a bit more about that.' Or the turning back of a participant's question. 'Can *you* tell *me*.' Or by repeating phrases used by a participant to encourage him or her to continue the analysis. 'You say you got only half of what you went in for...' Or simply a look.

A supportive intervention affirms the value of the participants, their ideas, attitudes or actions. In the counsellor-client or therapist-client relationship much is made of this intervention. It is the caring intervention in which the therapist tells the client without qualification that he or she admires, respects or values (even loves) the client. Of course the client may have very low self-esteem and so have difficulty hearing or believing the therapist. In which case, as Heron points out (1986, p. 80), such an unqualified affirmation may actually be a confronting intervention rather than a supportive one.

For the union trainer, Heron's discussion of this kind of intervention reminds us of the value of offering praise, unqualified, directed at participants as individuals, and genuinely meant. 'You handled that exercise well.' 'That was perceptive.' And if the trainer means it, then there is no more supportive comment to make to a committed activist and participant, no better intervention, than: 'You've got a lot to offer your union.'

Chapter 19: Dangers and Difficulties

Encounter groups, counselling, and other forms of therapy provide the union trainer with ideas and techniques to apply to his or her training. But the question is: how far do we go with these ideas and techniques? Educators working in this tradition can be so passionately committed to the process of facilitation that they seem to abandon the idea of instruction - the didactic role of the trainer - altogether:

I wish to begin this chapter with a statement that may seem surprising to some and perhaps offensive to others. It is simply this: 'Teaching, in my estimation, is a vastly over-rated function.'

Having made such a statement, I scurry to the dictionary to see if I really mean what I say. *Teaching* means 'to instruct'. Personally, I am not much interested in instructing another in what she should know or think, though others seem to love to do this. 'To impart knowledge or skill'. My reaction is, why not be more efficient, using a book or programmed learning? 'To make to know.' Here my hackles rise. I have no wish to *make* anyone know something. 'To show, guide, direct.' As I see it, too many people have been shown, guided, directed.... (Rogers, 1983, p.119).

A page later:

So now with some relief I turn to an activity, a purpose, which really warms me - the facilitation of learning. When I have been able to transform a group - and here I mean all members of the group, myself included - into a community of learners, then the excitement is almost beyond belief. To free curiosity; to permit individuals to go charging off in new directions dictated by their own interests; to unleash the sense of enquiry; to open everything to questioning and exploration; to recognise that everything is in the process of change - here is an experience I can never forget (Rogers, 1983. p.120).

Rogers continues with a discussion of qualities and attitudes that facilitate learning such as realness, prizing, trust, acceptance, a 'puzzlement', and empathetic understanding. But is there any substance in this enthusiasm and his oddly downbeat abstractions like puzzlement and prizing, or is it all simply empty rhetoric?

Indeed it is my belief that training drawing on the psychotherapy tradition can easily become self-indulgent and directionless, and that in some forms it can become corrupt or misguided.

Self-indulgent training

This kind of adult education or training can be self-indulgent because it so firmly concentrates on the individual learner, and on the personal life of that learner. Its aim is to help the learner achieve self-actualisation and, while it promotes the idea of valuing the person, it often does so without any political fervour. Rogers' concern with politics seems to be limited to the shift of power within the school or educational institution from teacher to student - from teacher-centred learning to student-centred learning. Heron talks of political values that underlie his kind of practice but relates these to the one-to-one relationship between facilitator and client.

A number of writers, as we have seen, do deal extensively with groups, but they are groups that will support the individuals within them - that will enable individuals to go 'charging off in new directions dictated by their own interests'. And they are groups that will disband once individuals in the group have achieved a degree of self-actualisation. These writers discuss methods of disbanding, 'mourning', and closure. 'The fruit is harvested and stored, the harvesters give thanks and go their way' (Heron, 1989, p. 27). Something in the hyperbolic and emotive style of these writers reflects this self-indulgence, this emphasis on personal gratification. Certainly there is little in the discussions of closure about developing any kind of lasting political cohesiveness.

Directionless training

Adult education practice drawing on the psychotherapy tradition can become directionless because its aims are sometimes non-existent or ill-defined. Because growth, self-knowledge and self-actualisation cannot be described in very adequate objectives beforehand, the process, the *experience* of learning, becomes all important. It is the journey that matters, not the destination. When writers in this tradition do talk of outcomes, it seems to be an article of faith that what will be learnt by participants will be good for them. They will become self-fulfilled people. They will achieve a number of vague but good sounding outcomes such as 'new perspectives on experience, change in behaviour, readiness for application, commitment to action' (Boud, Keogh and Walker, 1985, p. 36). They will grow and this growth, it would appear, will be benign. Connole makes the claim that 'in a sense all adult learning involves personal growth' and goes on:

Growth expands our consciousness of both self and others and opens us to more choices in beliefs, emotional reactions and behaviour than were previously available to us. Old boundaries and limitations begin to dissolve. We experience ourselves as more powerful and also more responsible than before (1992, pp. 273-274).

Restricting our training to the achievement of a number of unimaginative behavioural objectives may constrain the learning and impede the development of the people involved in the learning as people, but if we do not have some idea of where we are going we could end up anywhere. For people with time to indulge themselves, to go after some open, unspecified growth, this may be no problem. For people involved in union training, this may lead to a waste of time and resources.

Corrupt or degenerate training

Worse, working without objectives and concentrating on process can lead to corrupt or degenerate forms of education and training. Educators become experts in method and because they are not constrained by a set of openly stated and agreed objectives, they can use their skills to manipulate participants, leading them in directions that may be in the educators', not the participants', ultimate interest.

A trainer can create anxiety in participants and then, by reducing their anxiety, gain their gratitude and so establish control over them. This happened on a course for union officials where very early on a trainer set an exercise requiring each participant to prepare a ten-minute talk and then present it to the rest of the group. No instructions on how to prepare or present the talk were given. The anxiety level was immediately very high. Here were officials being required to demonstrate a skill that was central to their jobs under very artificial conditions and in front of their peers. Failure to do it well would result in humiliation. The participants dispersed to prepare and rehearse. During this period the trainer visited some of the participants, offering advice on topics and suggesting a structure to follow. If a training session had been run beforehand in which topics were canvassed and possible ways of structuring a short talk discussed, then everyone would have felt they were involved in a common experience and everyone would have known what they were meant to do. As it was, the trainer offered help to a limited number of individuals, gaining their gratitude for the rest of the course.

There are other examples of the misuse of educational methods based on the psychotherapy tradition. A number of organisations have appeared that offer some

kind of rapid personal growth for people ready to pay and attend intensive 'courses'. These courses enrol large numbers - often over a hundred people - and the facilitators then use a mix of techniques to mesmerise and manipulate the 'participants'. They employ a subtle form of food-deprivation and sleep-deprivation by haranguing the group over long periods that go past meal times and late into the night. They place pressure on individuals, breaking down their defences by publicly 'analysing' the person in front of the whole group. By doing this they can create a kind of mass hysteria in which the people present in this non-intimate, non-confidential setting are made to feel part of a large and warmly supportive group. A kind of peer pressure is created in which some of the people compete to make yet more personal revelations in front of the whole group.

The process can be pernicious. If a person is attracted to these workshops because he or she feels inadequate or unfulfilled in some way and nothing more is offered, the inadequacy is subtly transformed into a dependency. The 'educator' encourages an admission of dismay, then offers an 'explanation' for the dismay within the 'comfort' in this large group. The person experiences a transient transformation. But the group is actually large and impersonal so the comfort may not last. And since the 'course' offers no tools, no content, no processes for actually dealing with inadequacies, there is likely to be further dismay, and a need for further courses. A lucrative cycle is established.

These kinds of adult educator can also misuse the lack of clearly defined objectives. Some of them make the claim that they never fail. But when you provide a process without objectives, if people remain distressed, if the transformation does not come, you can always tell them that the process is working all right but that they simply have not got to the end of it yet. You can deflect criticism from yourself to the client by telling them that they have so many blocks, so much psychological baggage to get rid of, that the process will take longer for them than most others. With no objectives, there can be no criticism and no evaluation. Indeed, as Odiorne says in his attack on what he describes as 'sensitivity training':

... [I]t has built into its system an automatic rejection of orderly, rational, conscious criticism (1970, p. 51).

Odiorne notes that educators working in this mode usually claim success for their work simply by recounting anecdotes, so mounts a counter attack by producing a series of devastating anecdotes describing this kind of educational activity going

dreadfully wrong, disrupting organisations and ruining individuals' lives. Odiorne was writing some time ago but I know of no more trenchant attack on practices that are still widespread in some kinds of adult education and training program.

Misguided training

And to complete my series of caveats, some adult educators and trainers drawing on the psychotherapy tradition can be honest, caring, everything that is honourable, but nonetheless misguided.

In the process of caring for and respecting the learner we tend to see our role as helping the learner meet his or her personal needs. Indeed, a lot of experiential learning is concerned with helping learners understand themselves and clarify their needs - for love, for understanding, for belongingness, for self-fulfilment. But there are troubles with the concept of need, even when we are talking of prosaic needs such as improved skills in chairing a meeting, or a better understanding of the industrial relations system. A need is often defined as a gap between what is and what should be, between a current state of affairs and a desired state of affairs. And in the minds of both the educator and the learner a *gap* can very easily become a *lack* - that is, a failing or a deficiency.

Once we have made this initial slip in our thinking we can very easily begin building the curriculum for our training on what we perceive as the learners' deficiencies, rather than building it on their strengths. We can come to think of the adult learner as in some way lacking, incomplete, socially deviant, or even ill. If we have a vision of a 'fully functioning person' then it is all too easy to see the learner we are working with as less than fully functioning. Keddie (1981) describes this as the 'social pathology model' of education and demonstrates how a group of well-meaning educators made this slip and assumed in the design of an adult basic education curriculum that if adults needed to learn to read and write, they probably needed advice in civic responsibilities, responsible spectatorship at sport, and family planning as well. From an image of adults whom we might respect for their ability to manage in a world where most other people could read and write, these educators shifted to an image of adults who were incompetent in all aspects of their affairs including the management and conduct of their sexual lives.

The psychotherapy tradition in adult education, then, has ideas and techniques to offer, but it can also divert our attention from the main concerns of union training and distort our view of the people we train. One way of avoiding this distortion is to see

union members as having needs, not because of any real or supposed deficiencies, but because the world around them is changing. And, as I shall try to show, it is by focussing first on these external changes that the union trainer is more likely to facilitate discovery and insight that will be of value both to individual members, and to their unions.

Chapter 20: Change

Profound changes began taking place in industrial relations in Australia from the mid-nineteen eighties onwards. It is difficult to put a precise date on when these changes began, but we can find a blueprint for many of them in a report entitled *Australia Reconstructed* which carries the findings and recommendations of a joint ACTU and Federal Government mission to a number of European countries in 1986, and which was published in 1987.

Perhaps the best way of reviewing these changes is to define some of the phrases that by the beginning of the nineties regularly appeared in the press and were recited almost like a litany by union officials, representatives of management, Industrial Arbitration Commissioners, senior public servants, politicians and anyone else talking about the world of work. Key phrases in this new rhetoric included industry development, award restructuring, structural efficiency, work organisation, new technology, skill formation, career paths, strategic unionism, and consultation.

Industry development. From the recession in the early eighties onwards, the ACTU, the Federal Government, and some of the employer organisations perceived that Australia's future economic success depended on restructuring our industries. During the seventies we had placed too much emphasis in the management of our economy on our primary industries, and we had allowed our manufacturing industries to decline. Now we needed to revive and modernise our manufacturing industries - both in order to export more and so increase the money coming into the country; and to replace imports with our own products and so decrease the money going out of the country. In addition we needed to process or refine our primary produce - turning iron ore into high quality steel or wool into clothing, for example - and so add value to it before exporting it.

Work organisation. To achieve a new and modern manufacturing industry we needed to change old fashioned management practices. These practices were enshrined in the hierarchical management structures of many of our industries and organisations. In these traditional or 'Taylorist' structures all the decisions were taken at the top and the actual work was done by unskilled or semi-skilled workers on a production-line basis. The workers at the bottom of the structure had no say in the decisions, and the structure offered them few incentives to offer any ideas or take any initiatives. These organisational hierarchies needed to be flattened out, workers given more interesting and varied work, and decision-making shared throughout the workforce. As part of this reorganisation of work, production lines needed to be

replaced by a system of semi-autonomous work groups: teams of workers who made decisions amongst themselves about the way the work was done; and who negotiated with other work groups to ensure that the quality and flow of work from one group to the next was maintained.

Award restructuring. To reorganise work along these lines we needed also to change many of our former work practices. These practices were enshrined in the formal awards that defined and classified work and set out the conditions and rates of pay for each of those classifications. In some awards there were hundreds of classifications, with the result that workers were limited to narrowly defined sets of duties which were repetitive and without interest or challenge. Some awards carried classifications of work that were out of date. All of these awards needed to be rewritten and rationalised to free up the workforce so that workers could organise themselves into the kinds of work groups or teams described above, and play an active and creative part in designing the way they worked.

Structural efficiency principles. By the late eighties a large number of awards were being renegotiated between unions and employers, and radically rewritten. For example, in the metal industry over 300 classifications in the old award were reduced to just fourteen broad classifications in the new award. New awards needed to be ratified by the Industrial Arbitration Commission and the Commission linked the granting of certain elements of wage and salary increases to progress in the restructuring of awards in each industry. To regularise this process the Commission handed down a number of structural efficiency principles in its August 1988 national wage case decision. These principles were meant to ensure that changes in our awards and our workplaces were achieved in ways that benefited both workers and management, improved the structural efficiency of enterprises and improved productivity.

New technology. Along with old fashioned ways of organising work, Australia had old fashioned technology. Since the Second World War much of Australia's manufacturing industry had been protected from overseas competition by tariff barriers, with the result that many enterprises failed to invest in the kinds of up-to-date manufacturing plant being installed in other countries. In the eighties some Australian industries were still using manufacturing processes and technologies of the fifties. Following its election in 1983, the Federal Labor Government began removing protective tariff barriers, forcing Australian industry to compete with overseas manufacturers. To become competitive required not only changes in work

and management practices but a major investment in new tools, new machinery, new plant, new processes, new software and new hardware.

Skill formation. It was recognised that along with new technology, new organisational structures and new ways of working would come an enormous demand for training - and not just training in the skills needed by workers to perform their immediate tasks. People at all levels in the workforce would need new and expanded skills. Members of work groups would need skills in problem-analysis and problem-solving, group processes, quality control, stock control, and negotiation. They would need an understanding of the whole manufacturing process, different kinds of work organisation, and the enterprise's potential and policies. Supervisors and managers would cease being a kind of warden or police officer and would need training in facilitation skills, team-building and leadership. Skill formation was a phrase coined to describe this expanded idea of training and learning related to work, and covers training and learning that is formal and informal, on-site and off-site, one-to-one and in groups, in conventional course form and in modular or self-directed modes.

Career paths. If learning and training were to take on a higher profile in the workplace, then workers should be able to benefit professionally and financially from that learning. This was one of the key demands by the unions during award restructuring negotiations and in response the Commission required new awards to be restructured in a way that permitted workers to progress along career paths. Where once a worker might have been obliged to perform the same skills throughout his or her career in a repetitive and boring job, now he or she should be able to develop new and multiple skills through training and so win an increase in wages and a more responsible position within the organisation's structure. In theory a worker, given the necessary competence and application, would be able to progress from an unskilled job to a level of work requiring a tertiary qualification, and be able to undertake the training and the study necessary to achieve this progress with the support and cooperation of the employer.

Strategic unionism. Associated with award restructuring was the ACTU policy of strategic unionism. In the mid eighties Australia had over three hundred unions. Many of these were very small, and therefore under-resourced. Some were craft-based, others industry-based, and some were enterprise-based, leading on occasions to conflicts of interest and competition for members. Some of the large unions had coverage across a large number of very different industries, meaning that their focus was diffused and their resources stretched. To combat these problems the ACTU

began a push to form some twenty to thirty 'mega-unions', either through formal amalgamation (made easier by changes in 1988 in federal industrial relations legislation) or by forming industry groupings of unions. As an example of amalgamation, in 1991 most of the unions covering workers in the finance industry - the former Australian Bank Employees Union, the Australian Insurance Employees Union (whose Field Officers' course I described in an earlier chapter), the AMP Society Staff Association and others - formed into the single Finance Sector Union. And as an example of an industry grouping of unions, several unions have come together to deal with matters relating to the metal industry under the Metal Trades Federation of Unions.

And last in this glossary, *consultation*. These new industry groupings of unions facilitated negotiations with government and employer bodies at a national or state level but, to implement and oversee changes at a local level, effective mechanisms for consultation between workers and management in the workplace were also needed. Perhaps this was the most profound change of all. Instead of being treated as some kind of robot, or at best someone to be given orders with no questions asked, workers were to be involved in decisions about how the work they did was organised, and given opportunities to offer suggestions and take initiatives. Workplace consultative committees, often with training sub-committees, were established in many enterprises. Workers and management were equally represented on these committees and most committees established rules of procedure that required the chair to rotate between a worker representative and a management representative on a regular basis. These committees set about conducting skills audits and process analyses, examining ways of introducing new technologies into their workplaces, reorganising work, and overseeing training programs for their colleagues to help them adjust to and take advantage of the changes.

From 1987 into the nineties, then, enormous changes in both thinking and practice began taking place in workplaces. Management structures were simplified and some of the decision-making passed to the shop floor. Production lines were reorganised into a number of semi-autonomous work groups. The conditions under which people worked were revised. Advancement through training was made possible. And workplace consultative committees were established.

Clearly these changes did not happen everywhere. There were organisations, sectors of government and even governments that resisted them, the most regressive being the new conservative government in the state of Victoria from late

1992 onwards. And the retrenchments and redundancies in the recession in 1991 and 1992 soured relations and halted or reversed progressive change in a number of enterprises. But radical change occurred in enough large enterprises and departments to make its mark. And award after award was reviewed, renegotiated between unions and managements, and in its restructured form ratified by the Arbitration Commission.

Chapter 21: The Bosses Came

The changes in awards and work organisation brought about changes of focus and style in union training.

Until the mid nineteen-eighties TUTA's training emphasised skills training aimed at equipping union activists to perform particular roles. The staple program offered by its regional centres, whether in Perth or Sydney, consisted of three-day and four-day courses for workplace representatives, and a four-day course for union activists representing their members on occupational health and safety matters.

The workplace representatives courses dealt with skills such as handling a member's grievance, interviewing to get the facts, reading and interpreting an award, organising one's time and resources, conducting workplace meetings, and meeting and negotiating with management; and included information sessions on the industrial relations system, some industrial relations law, and details of recent wage decisions.

The occupational health and safety courses included information sessions on relevant law, ACTU policy, and common workplace hazards; and skills training in hazard identification, site inspection, basic research, managing and participating in meetings, interviewing, and report writing.

Clyde Cameron College, too, focussed on skills and roles in its basic program and offered one, two or three week residential courses for organisers, industrial advocates, union education officers, union research officers, union administrators, editors and managers of union publications, and experienced workplace representatives.

Unions with their own training programs tended to follow the TUTA model, sometimes making use of TUTA trainers and training material. Often their programs consisted of induction courses for new members, courses for workplace representatives, and occasional courses for their officials and committee members.

However, as the changes described in the previous chapter gathered pace, union trainers, whether in TUTA or with individual unions or industry groupings of unions, found themselves required to develop and deliver a different kind of training. New courses were designed to explain the political, economic, social and industrial imperatives behind industry development, award restructuring and strategic unionism; to help members understand new awards with their new classifications and career paths; to introduce members and officials to different modes of work organisation; to help members appreciate the challenges, dangers and opportunities

involved in implementing new technological processes; and to prepare rank-and-file members to play an active and informed role in the new workplace consultative processes and the enterprise-level bargaining that new awards and new conditions encouraged. And by the nature of the courses and the nature of the times, trainers sometimes found themselves not just training people for change but actually involved in facilitating the changes.

Consultative committees

I was involved in the establishment of consultative councils in a large heavy industry enterprise. The process began with a course for workplace representatives. Two were run one immediately after the other in the same week so that by Friday fifty union activists from the enterprise had attended.

In the following week twenty union and twenty management reps locked themselves away in a motel conference centre and thrashed out a new industrial relations agreement that included the establishment of a system of consultative committees to cover the various sites.

Union officials then visited all the sites and addressed a series of meetings so that rank-and-file members of all the unions represented in the enterprise were informed and could react to the proposed system.

And as a final phase in this setting up process TUTA provided a four-day course for the twenty or so union representatives on the newly established committees.

I trained on the two-and-a-half-day courses in the initial phase, and the four-day course in the final phase. In the first course we discussed the economic background to award restructuring, local economic factors, the current state of the enterprise, and the current state of industrial relations in the enterprise. We got the participants to list the problems as they saw them and to look at how some of them might be resolved. We looked at old and new kinds of work organisation, and ended the course with a discussion about the feasibility of introducing genuine consultation into the enterprise.

The bosses

The courses were for unionists and run by unionists. But it was on the boss's time so we were obliged to set a session aside during the second day of each two-and-a-half-day course for a plant manager to address the troops. As it turned out,

management's involvement in the course provided the opportunity for an unanticipated but magical moment of training.

The plant manager arrived flanked by two younger men from the enterprise's human resources division. He sat down inside the U but to one side, while his acolytes busied themselves at the overhead projector. It was interesting to note how the plant manager sat - confident, relaxed, slumped back slightly with his legs stretched out in front of him. The two assistants delivered the address, using overhead transparencies giving projections of output and planned changes to the plants. Both were at ease and apparently untroubled when they outlined possible future 'downsizing', that is, retrenchments at a number of sites. The plant manager did not take part in the initial presentation, but answered some of the questions.

The manner, posture and almost truculent behaviour of the three men was very much the same in the second of the two-and-a-half-day courses. So far nothing very special. On both occasions, once they had left, we discussed what they had said, in particular how we might counter the planned retrenchments, and then went on with the course.

The process continued at the motel and in the plants and three months later I came back to run the four-day course.

This second course dealt with skills needed in the consultative process and another trainer and I had designed sessions and exercises to help participants practise listening, questioning, giving oral and written reports, and working effectively in groups. We also had sessions planned that would deal in more detail with analysing production processes, and time set aside to prioritise issues participants might want to take through the consultative processes on behalf of the workforce.

Once again the course was on the boss's time, so once again the plant manager and his two young human resource managers came to address the group.

But something had happened. This time their manner was markedly different. The plant manager sat in the same place, but erect and alert. The two assistants gave the address as they had done the last time but they seemed less confident, and the one operating the overhead projector missed one of his cues, adding further to the impression that he and his off-sider were ill at ease. We had been practising listening and questioning in the sessions immediately prior to this session, so during the address all the participants took notes and when the address was over they began asking questions, often feeding back what the speakers had said, testing and seeking elaboration. The plant manager listened hard and answered fully and carefully. His two assistants watched attentively.

We had intended spending the session following management's address discussing what they had said but as soon as they had left the room my co-trainer, Alan Healey, took the discussion off on another tack. Healey was on a year's stint with TUTA from his position as education officer with what is now the Automotive, Metals and Engineering Union. He had started his working life as a fitter and in this training room he was with his own tribe.

'Did you see those blokes?' he said.

'What do you mean?'

'I mean the way they spoke, the way they looked.' Healey's eyes were gleaming.

A number commented on the respectfulness of the plant manager, and the nervousness of the other two.

I said: 'They were different from the courses a few months ago.' Healey looked at me, then at the group.

'Is Mike right?' he said.

There was general agreement.

'OK, so how were they different?' he asked them.

The group's interest was caught. Comparisons were made, some disputed, a number agreed upon. Healey let the discussion run for a while, then cut in.

'Why do you think they were different this time?'

There followed an animated discussion in which the group discussed their own and the bosses' reactions to all the changes going on, how everyone was being challenged, how they and probably the bosses too were reacting in a variety of ways - by resenting the changes, trying to ignore them, trying to take advantage of them, being excited or frightened by them.

'Why do we feel like that?'

'Everything's changed,' someone said. 'You blokes used to tell us that we had to fight the bosses and now everyone's telling us that we have to cooperate with them'

'So tell me who is right?'

This time Healey had to stop a number of people speaking at once. Once brought under control, the discussion was hard and intense, with the group examining their beliefs, comparing past ones with present ones, looking at why they held views they once had, what made them change, and whether their new ideas - and the new ideas being promoted by courses like this one - were any more sustainable.

Healey and I got swept up into the discussion along with the rest. Something had happened. We were engaged in a debate not only about the rights or wrongs of these new approaches to industrial relations but about our emotions, about the ideas

and values and assumptions upon which we built our lives. We had stepped through some kind of window.

Healey brought the session to a close. 'You blokes never told me why the bosses were different.'

'Because they knew they couldn't pull the wool over our eyes,' came the answer. 'Because when we're sitting in those committees now we're their equals.'

Chapter 22: Transformative Learning

An American adult educator, Jack Mezirow, provides us with ideas about learning that go a good way to explaining what Healey's persistent, almost pugnacious questioning made happen in that training room. But I need to go back a bit and explain how Mezirow arrived at some of his ideas.

In the early seventies Mezirow conducted some research into why mature women returned to university learning (Mezirow, 1975; Mezirow, 1991, pp. 167 - 169). What was it that made women, who had for a number of years accepted 'the traditional stereotypic view' of their 'proper' role (Mezirow, 1981), revise that view of themselves and set off on a course of renewed learning and personal development? How and why did women who had accepted positions as second class citizens in relationships, education and employment throw off the shackles? Mezirow and a team of co-workers interviewed participants, graduates and members of staff of programs designed for women re-entering colleges, and from this research developed a number of concepts to describe and explain these kinds of transformation in attitude and self-expectation.

Mezirow has written a number of articles and more recently edited a book and written another, all dealing with this 'transformative' kind of learning. Sometimes he has written obscurely, and he has created his own set of jargon; but his ideas have been hugely influential in the fields of adult education and training, and I believe that some of his insights have a particular and powerful relevance to union training.

Two key phrases in Mezirow's jargon are *meaning perspective* and *perspective transformation*.

Meaning perspective

... refers to the structure of psycho-cultural assumptions within which new experience is assimilated and transformed by one's past experience (Mezirow, 1981).

Here Mezirow is talking about how we can look at something and see something else. He is describing the kinds of mental filter we develop that distort our perceptions of reality, and let us see what we want to see or what we think we should see. A woman may be by far and away the stronger and more capable partner in a marriage, and consistently able to demonstrate this in the way she and her husband share and manage their lives. Yet because of her upbringing, because of the culture in which she lives, because of her conditioning, because of the assumptions she

makes about life, because of the values she has, because of the way she and others have behaved in the past, she reinterprets all the evidence in a manner that lets her believe that her partner is stronger, more capable and therefore entitled to make decisions on her behalf. What is more, she may not only believe this stereotypical or culturally induced view of her position in the partnership, but may invest a lot of energy and emotion in defending her position if challenged with evidence that contradicts it.

Already Mezirow's ideas have resonances for people working in union and workplace training. A group of workers may do a particular piece of work and therefore know how the work is done. Yet somehow they will accept that a manager who does not do the work and rarely comes on to the shop floor can make sensible workplace decisions on their behalf. Even though the boss cannot manage effectively under these conditions, the workers' expectations are that she or he can; and they somehow distort quite obvious evidence to the contrary to fit these expectations. Because of the workplace culture, because of the hierarchical management structure, because of the way the work is organised, because of such concepts as 'managerial prerogative', because this has always been the way, the workers explain away ridiculous decisions with sentiments such as: 'They must know what they're doing'; or excuse the folly of the whole managerial process by blaming the individual: 'This particular bloke's a real mug'; or deny reality completely by saying: 'It's got nothing to do with me'.

Or in another example, certain kinds of meaning perspective enable people to accept the unacceptable when comparing the relative 'value' of different kinds of work. What actually makes one kind of work better or more valuable than another? Who can really say? And yet our society continually makes value judgements about the work people do, basing these judgements on sets of 'psycho-cultural assumptions', that is, on unproven but widely accepted ideas such as: that mental work is somehow more valuable than manual work. A particular meaning perspective can enable whole sectors of society to consider that a barrister that ties up the courts with subtle defences for a dishonest entrepreneur is somehow more worthy of respect (and justified in receiving considerably higher remuneration) than a garbage collector who works to keep our city free from disease.

Mezirow's second piece of jargon is *perspective transformation*. This is the process of getting to grips with our meaning perspectives and changing them so that we can see the world and ourselves a little more realistically. Mezirow describes perspective transformation as:

... the emancipatory process of becoming critically aware of how and why the structure of psycho-cultural assumptions has come to constrain the way we see ourselves and our relationships, reconstituting this structure to permit a more inclusive and discriminating integration of experience and acting upon these new understandings.

Having given us this definition he goes on:

It is the learning process by which adults come to recognise their culturally induced dependency roles and relationships and the reasons for them and take action to overcome them (Mezirow, 1981).

Mezirow is describing the process of becoming aware of the filters through which we look at the world, of understanding how they got there and how they distort the way we see ourselves and others, and of adjusting the filters to get rid of the distortions. How had some of those women accepted the unacceptable? What in their background, their culture, their 'education' had made them accept as 'real' or 'normal' that they should occupy a secondary role within their relationships? How, then, had they come to see that this particular view of themselves and the world was based on a set of values and assumptions that could be challenged? And how had they constructed a new set of values and assumptions upon which to build new and different lives?

Disorienting dilemmas

Mezirow suggests that the process of perspective transformation may start with some kind of jolt, what he calls a 'disorienting dilemma'.

There are certain challenges or dilemmas in everyday life that cannot be resolved by the usual way we handle problems - that is, by simply learning more about them or learning how to cope with them more effectively. Life becomes untenable, and we undergo significant phases of reassessment and growth... (Mezirow, 1977, p.154).

These significant phases of reassessment and growth include a period in which we take a hard look at ourselves and at the kinds of assumptions and values we may have accepted up till now. This may lead to 'a sense of alienation from traditional social expectations' - that is, having realised we have been living a lie we may feel an

outsider from those who are still living the lie. This in turn may force us to seek out others who feel like us or who have been down the same track before us. From here we may look for new roles and new ways of leading our lives; prepare for and try out our new roles; and finally effect 'a reintegration into society on the basis of conditions dictated by the new perspective' (Mezirow, 1981).

We may be confronted by a disorienting dilemma suddenly. A crisis may project us into a period of reassessment. Or we may find ourselves presented with a disorienting dilemma that has developed over a long period of time. Gradually the reality of our situation grows further and further removed from our view of reality, until finally the contradictions in our life become simply too great to ignore or explain away.

Mezirow draws his examples from his research into women reentering college. Perspective transformation may be triggered by a crisis such as divorce, change of residence, or the death of a partner; or come about as a result of a woman's gradual realisation, for example, that her present lifestyle, mode of thinking and interests are less 'authentic' than those of her more emancipated friends. In this second case the disorienting dilemma results from the woman gradually sensing that she would share her friends' interests if only she could free herself from a belief system based on gender stereotypes. The disorientation comes about because she feels there is more to life but she cannot quite break free from her past experience and her current ways of thinking in order to see what that 'more to life' might actually be. Mezirow argues that it is the task of adult education to help people recognise the internal and external factors that impede their development and that limit their ability to know what their real interests are.

We can find examples of disorienting dilemmas from the world of work to match the ones quoted above. Workers can be presented with a sudden and disorienting challenge to their belief systems by sudden redundancy or the closing down of a workplace. A workforce, and indeed a whole town, might operate on the belief that a long established industry in that town will always be there and will always provide the economic base to their community. People will build their lifestyles, plan their futures, raise their children on the unspoken assumption that they will always have employment and economic security. When that industry suddenly closes, or moves, or threatens to move, those workers are presented not just with the shock of the loss of jobs and security and income but the disorientation of having basic assumptions upon which they have built their lives brought into stark and terrible question.

The film *Controlling Interest* (California Newsreel, 1978) shows just such an event occurring in a town in the United States of America. We see the workers and their union taking action and the film can be viewed as a study in industrial action. But if we view it with Mezirow's analysis in mind, we can also see it as an account of people going through a profound learning experience. Dilemmas can either lock people into stereotypical positions or bring about considerable reassessment of themselves and their values and assumptions. Closer to home, films such as those depicting the SEQEB dispute in Queensland (Ronin films, 1987) or the closure of the coal mine at Kemira in New South Wales (Kemira Productions, 1984) carry interviews with people involved, some demonstrating entrenched views and others the kinds of change that Mezirow would call perspective transformation.

An example of gradual disorientation can be found in the personal work histories of many people trapped within hierarchical or 'Taylorist' work structures. A male apprentice welder entering work for the first time will find nothing strange in being told exactly what to do by a supervisor, in being told to weld here and then here, with the supervisor actually pointing to where two pieces of metal are to be joined. By twenty, the welder is now active in the community, having taken a position on the surf life saving club's executive and some responsibility for training new club members, yet still in his work is told to weld here and then here. By his mid twenties the welder now has a partner, co-owns a house and co-manages a mortgage. Still at work he is given no say in how his work might be done and no recognition that he might be able to make decisions himself. Into his thirties and the welder now holds an officer position in the surf life saving club, makes decisions about buildings, equipment and recurrent expenditure in the hundreds of thousands. At home he shares responsibility for bringing up children, dealing with their crises and helping them meet a whole range of aspirations. At work he is still told to weld here and then here. Such is the work culture and the supervisor's and the welder's past experience that the glaring mismatch between one 'reality' and the other is ignored or accepted as 'normal' or explained away for a number of years until finally the disparity between the two 'realities' is too great for the welder to comfortably continue.

Challenge

Mezirow's research focussed on those women who had actually got to college. But what happened to those who were confronted by disorienting dilemmas and did not seek reentry to college? If we give the full force of its meaning to the word

'disorientation' then we must assume that some experienced breakdown, or developed an almost pathological 'blindness' to allow them to continue functioning in their 'culturally induced dependency roles' without breaking down (or perhaps sought instant transformation by attending the kinds of workshop described in an earlier chapter).

Mezirow's ideas present the union trainer with an interesting challenge. Do we wait for a disorienting dilemma to present itself, and then exploit the situation to help people learn? Do we adopt a more proactive role by actually drawing people's attention to dilemmas they may not have fully recognised or confronted? Or do we actively and vigorously enter into the affairs of other people to help create the dilemma? Mezirow argues that such dilemmas can be the source of a profound and very special kind of learning. So, do we have to wait for the welder to recognise the dilemma - with the attendant risk that he might break down in some way or develop some pathological defence of his unjustifiably subservient role in the workplace? Or do we intervene?

At a time of rapid change in industrial relations, unionists are being presented with sudden challenges to change their methods of work and ways of relating to each other and to management. By and large union training has limited itself to providing information and the necessary skills to deal with these changes, along the lines of the courses for members of consultative committees described above. Little or none of this training has calculatedly used the change as a starting point for perspective transformation. But with such change and challenges about, perspective transformation will occur. Opportunities, such as the 'window' that Healey opened after the bosses had addressed the group, happen. So, do we wait for the opportunities to come along, or do we develop and use techniques to *make* these opportunities happen?

Domains of learning

Healey intervened in a session that was meant to consider the substance of the bosses' address. By doing so he shifted the learning from information that might help participants understand their workplace better into another domain altogether, where the participants examined and debated the values and assumptions on which they based their workplace lives.

Mezirow describes three 'domains of learning', and they help us understand what happened in that session.

Mezirow takes as his starting point certain ideas drawn from the German social theorist, Jurgen Habermas, and adapts them to the context of adult education. As I read him, Mezirow does not claim to represent Habermas' ideas in detail but simply draws upon them in a search for insights into adult learning. What follows, therefore, is a discussion of Mezirow's interpretations (1981, 1990, 1991) and Mezirow's analogies:

Habermas (1972, 1987) describes three areas in which we generate knowledge. The first is the *technical* area. This is where we create knowledge in order to control and manipulate our environment. This area of knowledge is to do with understanding and managing the world around us. In conventional academic terms, this kind of knowledge and learning is to be found in the empirical-analytical sciences like physics and geology.

Mezirow relates this first area to adult learning and describes it as the kind of *instrumental learning* we engage in to achieve task-related competencies. In this domain of learning we are concerned with understanding relationships between cause and effect, with developing knowledge by testing hypotheses, with the gathering of observable evidence.

Instrumental learning always involves a prediction about observable things or events (Mezirow, 1991, p. 74).

This domain of adult learning relates closely to the mechanistic tradition, to the world of training people to achieve behavioural objectives, to the business of designing and providing learning through needs assessment, task analysis and the rest of it, to the business of training people to survive in the world and perform their jobs. It is concerned with solving problems through weighing up the likely outcomes of a number of options and then testing the validity of the most plausible option.

If Mezirow has taken his line from Habermas, then I would like to take my own line from Mezirow and try to sum this first domain up by saying that it is about *learning to perform a role better* - about gaining the knowledge and skills necessary to be a more efficient waiter or archivist or machinist or, in the union training context, to be a more effective member or organiser or workplace rep or advocate or occupational health and safety rep.

The second area in which we generate knowledge Habermas describes as the '*practical*' area. This is where we create knowledge in order to understand our condition, not so much in terms of our interaction with the material world but in terms

of ourselves and our interrelationship with others. In academic terms, this kind of knowledge and learning is to be found in the historical-interpretive sciences such as history, theology and the descriptive social sciences like anthropology and sociology.

Mezirow describes this second domain as *learning for interpersonal understanding*. In contrast to the instrumental learning of the first domain, this domain is concerned with dialogic learning, with gaining insight and understanding through communication and interaction.

Most significant learning in adulthood falls into this category because it involves understanding, describing, and explaining intentions; values; ideals; moral issues; social, political, philosophical, psychological or educational concepts; feelings and reasons (Mezirow, 1991, p. 76).

In this kind of learning we arrive at generalisations and solve problems, not through objectively testing a hypothesis but by reaching a consensus through 'rational discourse', that is through careful and considered communication and consultation with others.

All the adult learning and education to do with communication skills, assertion and empathy training, conflict resolution, listening, group work, self-expression, confidence building and the like would fall into this domain of learning, as would most adult education in the liberal tradition. So that, where I summarised the first domain by saying it was about learning to perform a role better, this domain might be described as being about *learning to be a better person* - that is, better at being a person, better at relating and communicating, more sensitive, more knowledgeable about culture and history, and so better at understanding one's own and others' condition.

I would argue that most if not all union training operates fairly and squarely in these first two domains. But Mezirow argues that there is a third domain, and that this third domain of learning is a peculiarly adult one.

Habermas describes the third area in which we generate knowledge as the '*emancipatory*' area. In this area we are concerned with self-knowledge, with knowing who we are, how we came to be who we are, and the factors that continue to constrain and shape the way we see ourselves. In academic terms this kind of knowledge and learning is to be found in the critical social sciences such as psychoanalysis and the critique of ideology.

Mezirow describes this third domain as *learning for perspective transformation*. In this kind of learning we do not just learn to look at the world more clearly. We learn *to look at ourselves looking at the world*. We learn how to perceive our perceptions. We become aware of our awareness, and of how our awareness is constructed.

Perspective transformation involves not only becoming critically aware of habits of perception, thought and action but of the cultural assumptions governing the rules, roles, conventions and social expectations which dictate the way we see, think, feel and act (Mezirow, 1981).

In this kind of learning, then, we address problems through critical reflection: that is, through examining awareness, through identifying and examining meaning perspectives in order to understand how they influence the way we see the world and the kinds of position we adopt. In this process we may recognise that our perceptions are distorted by 'institutionalised ideologies', 'reified power relationships' and 'internalised cultural myths' (Mezirow, 1981); and we may set about transforming our perspectives so that we are freed from the kinds of influence that limit our vision and cramp our ability to act.

A union trainer operating in this domain, then, would help members examine their beliefs and how they come to have them. He or she would create situations in which union members could debate policy and question given wisdoms in order to understand how these policies and given wisdoms came to be accepted, and to establish whether they are vital, valid and in the interests of the union and its members, or simply 'institutionalised ideologies'.

The union trainer would help members examine their own ways of relating to others and to 'authority'. She or he would create situations in which participants could examine the 'culturally induced dependency roles' some workers adopt or the 'reified power relationships' that exist in the structures in workplaces. Participants might, for example, examine how it is that some people - both bosses and workers - can continue accepting the 'right' of a multinational company to make decisions - to close down a factory, say - that will affect the culture and economy of a locality far removed from where the decisions were made.

And the union trainer would help members examine the stories, the dogma, the unquestioned versions of events - theirs and their unions' 'internalised cultural myths' - that lead them to accept particular ways of acting, that prompt statements such as 'it's always been done this way' or 'that's been tried before and didn't work' or 'he

was paid to take risks'. The trainer would set up situations in which participants could examine the validities and the falsehoods enshrined in the stories of past struggles, and help them establish a feeling for people and movements and events based on sound information and critical reflection. She or he would help participants identify where set ways of thinking and behaving might lead them to needlessly repeat mistakes.

Mezirow, then, has a lot to offer the union trainer. After all, if we can help our members become critical thinkers, people who perceive their perceptions, people who understand how values and assumptions, ideologies and beliefs come to be constructed, then they will be able to subject others - including the boss and anyone else in a position to influence and exploit them - to a similar, critical analysis. If they can see through themselves, they will be able to see through others. At the very least, our members will become people who are extremely difficult to fool.

Someone who successfully engages in learning for perspective transformation cannot stay the same, so if I try to encapsulate this third domain in the same way as I have tried for the other two, I would say that the first domain is about learning to perform a role better, the second domain is about learning to be a better person, and the third domain is about *learning not only to be better but different*.

Self-directed learning

Mezirow sees this kind of critical reflection leading to perspective transformation as a uniquely adult form of learning.

It is only in late adolescence and in adulthood that a person can recognise being caught in his/her own history and reliving it (Mezirow, 1981).

And he argues that the role of the adult educator is to help learners achieve this level of critical reflection and so become fully competent, fully aware, fully *adult* learners.

Mezirow, therefore, is a supporter of the concept of andragogy - that there are features of adult learning that mark it off from child learning - and he links his concept of andragogy to the idea of the adults taking full control of their own learning.

Andragogy, as a professional perspective of adult educators, must be defined as an organised and sustained effort to assist adults to learn *in a way that enhances their capability to function as self-directed learners* (Mezirow, 1981).

The course for union reps on consultative committees was planned to operate within the first two domains of learning. The aim was to equip participants with information and skills to perform their roles on the committees effectively: learning that could be said to belong in the first domain. And a number of the skills were to do with communication and interpersonal understanding: learning that could be said to belong in the second domain.

But the bosses came, and in the session that followed Healey took the group into the third domain. What had been planned as a straightforward examination of what the bosses said became a session in which the participants examined their attitudes to the bosses, and the meaning perspectives that controlled and formed those attitudes. By getting the participants to focus on their present attitudes and then compare them with their past ones, Healey was able to demonstrate that both past and present attitudes were constructed. Once this was done, he could begin encouraging the participants to examine *how* their attitudes and value systems were constructed. The whole session may not have been given over to learning in the third domain, and not everyone present may have found themselves engaging in critical reflection, but people were engaged, the discussion was energetic and searching, and for some at least a window had opened.

Following that session Healey and I discussed the remainder of the course with the participants, and handed over the responsibility for managing and conducting most of the final day to them. They worked for some of the day in groups, preparing and practising reporting back the proceedings of consultative committees to members, then prepared and came together to hear each group present a report of the bosses' address. The exercise was decided by the participants and the plenary session was managed by members of each group. However briefly we had entered the third domain, one of the results had been a move away from control by the trainers to control by the participants.

Chapter 23: Transformation or Conversion?

The move into the third domain in the consultative committee course was not planned, and came about by good fortune and quick-witted intervention. Following that experience I try to stay alert for the opportunity to open a window, and Mezirow provides me with an understanding of what can happen and how I might exploit the opportunity. When somebody says: 'I never looked at it like that' or 'I see things differently now' we might be inclined to congratulate ourselves for having got our point across, and move on. If we do, we miss the opportunity to say: 'How *did* you see things?' and then 'What made you see things like that?' and then 'If we can understand how you came to have a set of ideas and attitudes then, let's look at how you come to have the ideas and attitudes you have now?'

Perspective transformation, therefore, is not some form of conversion. It is not about replacing one set of attitudes or values with another, or shifting allegiance from one party or faction or group of people to another. It is a move from the uncritical acceptance of one set of values and assumptions to a state of continuous critical appraisal of *all* our values and assumptions.

Earlier I provided a glossary of the some of the phrases and ideas associated with the changes in industrial relations in the late eighties and early nineties. At that time TUTA trainers were required to conduct courses aimed at explaining the implications of these changes. In one such exercise a number of us ran a one-day 'course' over and over until hundreds of union members in one large enterprise had been 'trained'. In the day we would look at 'traditional' ways of organising work, at Taylor and his theory of 'scientific management', and at how this contributed to production-line manufacturing and hierarchical management structures. By doing this we could demonstrate how certain values and attitudes in industrial relations - such as those that contributed to the demarcation of work and workers, and to authoritarian forms of supervision - had become entrenched.

So far so good. We were helping participants understand why until now most of us had accepted that industrial relations must be based on a conflict of interests. We were helping them examine their roles in the workplace and (although we did not use Mezirow's terminology) we were encouraging them to recognise that some of these roles were 'stereotypical' or 'culturally induced'.

But the purpose of the day was to prepare participants for new roles and new practices. We were meant to explain why some kinds of job demarcation should be abandoned and why workers should be encouraged to become multi-skilled, why old

hierarchical structures should be replaced with flattened structures, why production lines should be replaced by semi-autonomous workgroups, and why industrial relations based on conflict of interests should give way to a system at local level at least that was based on consultation and consensus.

Now some of these ideas are fine, but it is interesting in retrospect to see how we tried to put them across. By and large we sought to convince the participants of the value of these ideas by examining the economic pressures requiring us to change. We looked at Australia's balance of payments, at the need to increase and add value to our exports, and at the need to replace imports with home-manufactured products. We argued that more modern, more efficient manufacturing industries were part of the answer, and that union members could help achieve this through working smarter, working more flexibly, and consulting with management to make their workplaces more efficient.

Some of these ideas are all right as well, but we had shifted away from analysis towards a form of exhortation. While we were examining the practices to be discarded, it had been perfectly all right to demonstrate how they were based on sets of values that had been artificially constructed. But when examining the new practices our participants were being asked to adopt, we avoided examining the values they were based on or analysing how they too had been constructed. When examining traditional, Taylorist practices, we encouraged critical reflection. When explaining the new practices we shifted to a kind of rationalist argument based on a set of unchallenged assumptions - that increased productivity is good, that we must maintain and improve our standards of living, that tariff barriers should go and that we must compete in the international markets, that the 'free enterprise' system is to continue unchallenged, that the common interests shared by workers and management now override the conflicting ones, and so on.

We examined some of the meaning perspectives that had permitted us to accept the old order, but we did not examine the meaning perspectives that might explain how our union leadership had come to accept the new order. Although we offered lots of apparent explanations, the exercise became one of trying to bring about a one-day conversion.

Chapter 24: Personal Transformation and

Social Change

Mezirow's writing on transformative learning spans more than fifteen years. For me the clearest statement of his ideas is in his 1981 article, and up to this stage he seemed really to see the educator's role as a reactive one of helping people clarify what was already happening to them. His initial research was to do with women who were returning to learning, that is, with people who had already experienced a disorienting dilemma and had started the process of examining and transforming their meaning perspectives themselves.

More recently, however, Mezirow and others have examined ways in which adult educators and trainers can actually trigger transformative learning (Brookfield, 1987; Mezirow and Associates, 1990). In the 1990 book different contributors propose and discuss a range of methods for encouraging transformative learning. These include techniques and processes such as analysing metaphors, assumption analysis, writing biographies, using repertory grids, conceptual mapping, using critical incidents, writing journals, analysing media, and using literature to encourage emancipatory learning.

In his earlier writing Mezirow appears to distance learning for perspective transformation from action.

To help a learner become aware of alternative meaning perspectives...does not prescribe the correct action to be taken. The meaning perspective does not tell the learner what to do; it presents a set of rules, tactics and criteria for judging (1981).

And in this same article Mezirow describes the final stage in the process of perspective transformation as involving 'a reintegration into society'. There appears to be no examination of or attempt to *change* that society.

In his more recent writing, however, Mezirow talks in more political language.

No need is more fundamentally human than our need to understand the meaning of our experience. *Free, full participation in critical and reflective discourse* may be interpreted as a basic human right (1990, p.11).

He accepts that transformative or emancipatory learning must include action.

...[R]eflective discourse and its resulting insight alone do not make for transformative learning. Acting upon these emancipatory insights, a praxis, is also necessary (1990, p.355).

And he gives a proactive role to the adult educator, stating at one point that 'every adult educator has a responsibility for fostering critical self-reflection and helping learners plan to take action' (1990, p. 357), and at another that an adult educator in this context must be 'an empathetic provocateur' (1990, p. 360).

Yet his concept of the empathetic provocateur lacks fire. In the same paragraph he advocates that the adult educator develop the skill and sensitivity of 'the *outsider* (my italics) who helps learners to question...' (1990, p 361) and a little later on he says: 'Even educators working in collective social action ... *limit their role*' (my italics again) to activities such as 'fostering critical awareness', helping learners 'discover action options', 'helping learners develop the ability to take collective action' and 'helping them learn direct-action tactics for dealing with the system' (1990, p. 362). These activities might sound radical but in fact an adult educator could engage in any or all of them not only whilst standing outside any social action taking place, but in the absence of any social action at all.

Mezirow also warns against the educator taking over the leadership of learners engaged in social action, but he does not discuss a third role the educator can adopt. In this third role the adult educator or trainer neither remains outside nor takes control. She or he engages in the action in solidarity with the learners *as part of the group*. Different members of the group will have different roles. Everyone will be engaged in action, but some will be concerned with tactics and strategies, some with coordination and logistics, some with finances, some with the group's interrelationship with other groups and other publics, and so on. In the adult educator's or trainer's case her or his role will be to encourage reflection and learning in the course of the action and in order to reinforce the action.

Perhaps my disappointment with Mezirow in this respect is exacerbated because this third role is one that union trainers can adopt and develop. Union trainers are likely to be members of the unions whose members they train, and therefore implicated in any industrial action those members take. They need, therefore, not to look at themselves as outsiders, or potential leaders, but as committed members, activists and learners as well as trainers and educators.

Mezirow has played a central role in establishing an organisation of adult educators concerned with promoting social change, and has mounted a spirited attack on those who would reduce 'continuing education to a training ground for production and consumption' and 'adult education to a technology divorced from any responsibility for social change' (1984) so it is surprising that there is a lack of a detailed political dimension to his writing on perspective transformation. Others have commented on this, and Mezirow responds in his book *Transformative Dimensions of Adult Learning* (1991, pp. 206 - 212); but in doing so he confirms rather than confounds his critics, saying:

Transformation theory - and adult educators - can promise only to help the first step of political change, emancipatory education that leads to personal transformation, and to share the belief that viable strategies for public change will evolve out of this (p.210).

The use of the phrase 'public change' is a worry. I am left with the impression that Mezirow sees social action in terms of orderly public events such as meetings at the local town hall; and that, while offering us considerable insights, his writings on perspective transformation will not help us face up to the sometimes violent kinds of conflict which can occur in the process of social change.

Part Six: Community Development and Social Action

Chapter 25: Violence, Social Action and Learning

Myles Horton was an adult educator working in the south of the United States of America who faced up to the existence of violence in the lives of the people he was helping to learn:

I know that in a class-structured society violence exists and the victims are the poor. And I'm not going to stand back when they try to devise ways of doing things and not try to help them work out their own ways of doing it. And I'm also sure in my own mind that there are times come when you've exhausted every avenue of change in a revolutionary situation, if the people won't get off your back and won't give you leeway to grow, you've got to push them off. And that's violence (Horton, 1981).

Horton recognised that his work would involve confrontation:

If you don't struggle against oppression, oppression moves in on you (Horton 1981).

And he saw his role as helping people transcend that oppression:

It's dangerous to do this kind of education, to push the boundaries to the place where people might be fired, or get in some kind of trouble. But you've got to get on that line, as close as you possibly can, and sometimes you'll analyse it wrong and get clipped. If people don't take chances, they'll never keep pushing. They must explore and push as far as they can. People get the exhilaration of liberating themselves, pushing the boundary line until they push it to the place where they're challenged, and they either have to back off or go further ... (Horton, Kohl and Kohl, 1990, p.183).

Horton knew violence at first hand. In 1933 he was involved in a strike in Wilder, Tennessee when his friend Barney Graham, president of the United Mineworkers local (union branch), was murdered by professional killers. And in 1937 when he was involved in organising a long drawn out strike by textile workers in Lumberton, North Carolina, Horton himself faced four gunmen who had come to kill him. Horton was in the busiest part of town on the busiest day of the week when the town emptied, the courthouse and police station closed and a car carrying the four gunmen arrived. Horton talked them out of killing him through a combination of gall, counter-threat and clever argument, and in recalling the incident said:

If you don't know fear in this kind of business, if you're playing on the cutting edge of social change, in conflict situations when the sides are lined up and there's violence all the time, then you'd better learn to know it (Horton, 1981).

By the phrase 'this kind of business' Horton means education for social change. Although committed to helping people organise into unions, Horton was first and foremost an educator. At Wilder, he was there with other members of staff from his Highlander Folk School, learning from the strikers and helping the strikers make use of the conflict in order to learn. (During that strike he was arrested and accused of 'coming here and getting information and going back and teaching it'.) And at Lumberton, as part of the industrial action, Horton organised educational meetings every night for the strikers and their families.

Talking about his work and that of the community activist Saul Alinski, Horton draws the distinction between an activist achieving an objective on behalf of a group or community, and an activist helping people in that group or community develop organisation, confidence and power. He argues that if he had to make a choice between actually achieving the objective, and using the struggle to radicalise people through learning, he would choose the learning (Horton, Kohl and Kohl, 1990, pp 176-181).

Highlander

Horton founded the Highlander Folk School in the Appalachian mountains, Tennessee, in 1932. Over the years Highlander has changed location and form. It has been closed by state decree (and re-established as the Highlander Research and Education Center), burnt down, attacked by racists, and investigated by federal and state police. Horton himself was beaten up, arrested, threatened, and called before a Tennessee legislative investigating committee, and the Senate Internal Security Committee. Horton was director of Highlander until the seventies and remained active and influential in its affairs until his death in 1990.

Highlander continues today with its own building near Knoxville, Tennessee, but the word 'Highlander' has also come to be used by those who know of Horton and Highlander's history to describe an idea or a tradition or a way of doing things.

The school was originally in a farmhouse and offered residential workshops for people struggling for social change, but although rural and residential, Highlander was not a retreat. In a letter written in 1933 Horton says:

We have found that a very effective way to help students to understand the present social order is to throw them into conflict situations where the real nature of our society is projected in all its ugliness (quoted in Lovett, 1980, p.161).

Highlander was established in a region of the United States which was caught in the worst grips of the depression and where communities were exploited by mining and textile companies that often controlled whole towns. Through the nineteen thirties and the forties Highlander worked in close association with unions, helping establish them and helping educate their grassroots leaders and then their educators. For a period, Highlander became the official labour school in the South for a major peak union body. In the fifties and the sixties Highlander loosened its ties with the unions, some of which had lost their radical drive, were over-bureaucratized and were growing stridently anti-communist; and worked closely with the growing civil rights movement, helping establish citizenship schools through the South to help black people learn to read and write in order to register to vote, and running workshops and schools for civil rights activists.

Horton demonstrated an uncanny ability to read and anticipate social movements and so was able to work within them and encourage their development. Sung and unsung figures of the labour movement, the citizenship school movement, and the civil rights movement passed through Highlander, some experiencing learning that projected them into action, others returning to share and analyse their experiences with other potential activists and leaders. Labour songs, and the version of 'We Shall Overcome' that became the anthem of the civil rights movement, were written there. Martin Luther King came to Highlander. And Rosa Parks attended a workshop at Highlander three months before she refused to give up her seat on a segregated bus and so launched the civil rights marches of the sixties.

Highlander has remained small, a single institution in the Appalachian region, and yet Highlander and Horton have influenced the lives of millions of people throughout the United States of America and in the world beyond.

Horton

Horton was an activist adult educator. He has given us a life to admire, to get to know, to emulate and interpret. Paulo Freire says of him: 'The history of this man, his individual presence in the world, is something which justifies the world' (Horton and Freire, 1990, p. xxxiii). Horton did not write very much but he was a great talker and luckily others have listened hard to him and recorded some of what he had to say. As a result his life is accessible, so to speak, through interviews or books based on interviews. Three of these are the books *Unearthing Seeds of Fire* (Adams, 1975) and *The Long Haul* (Horton, Kohl and Kohl, 1990), and two hours of interview recorded in 1981 for a television program *Bill Moyer's Journal* and broadcast under the title 'Adventures of a Radical Hillbilly'.

Horton comes across as disarmingly frank, an apparently simple, straightforward and folksy person, full of humour and stories. As one gets to know more about him, it becomes obvious that he was a subtle and skilled facilitator operating from a base of considerable reading, a person of strong political and ethical convictions. Horton spent several years studying (including several months in Denmark learning about the Danish Folk Schools), reading, searching out and consulting with thinkers and social activists like Jane Addams, and engaging in political and community action, before returning to the region of his childhood in order to establish Highlander. Yet when questioned in the television interview about influences on his thinking, he typically and cheerfully reduces the influences to three - the Bible, the poet Shelley, and Marx.

From the Old Testament he takes the image of the creation and affirms the creativity in people and the need for creativity in learning and social action. Horton's stories are full of examples of creative responses to oppressive action by mill owners, racists and the forces of 'law and order'. From the New Testament he takes the concept of love, saying that to work with people you must love people. However he does not argue that we must love everyone. He acknowledges that some people are 'just plain unloveable', and expresses pride in the kinds and character of the enemies he has made. In the poetry of Shelley Horton finds an individual and passionate anger at injustice and at the 'selfishness' and the 'all-enslaving power' of commerce. And in Marx he finds the tools for social analysis with which he can help people develop social meaning from their individual experience.

Horton's ideas are drawn from eclectic sources. He is influenced by Fabian socialism but dissatisfied with the do-gooder feel to it. He looks at certain utopian communities but dislikes their escapism. He draws on his religious upbringing and his

study under the radical theologian Reinhold Niebuhr at Union Theological Seminary, and he admires the revolutionary outcry against injustice by Jesus - ‘...one of the few examples of someone who simply did what he believed in and paid the price and would have done it again if he’d lived’ (Horton, Kohl and Kohl, 1990, p. 27); but he is cynical about a lot of religious people and deeply distrustful of people with missionary fervour. He read Marx and Lenin, and was drawn to socialism as a philosophy but could not submit his ‘strong mountain background of independence’ to the discipline required by the Communists. Again and again in his stories and discussion he returns to the concept of a ‘democracy’ that will give people control over many facets of their lives - political, economic, social and cultural - and again and again in his discussion of democracy he lays stress on ‘*economic democracy*’.

I believe in democracy. We don’t have it ... We have the trimmings of democracy ... You can’t have democracy at the workplace when the system is run for the benefit of the profit of somebody instead of for the benefit of all the people ... I knew economic democracy had to go hand in hand with political democracy (Horton, 1981).

Educational theory and practice

Peters and Bell sum up Highlander’s theory and practice in this statement: theory flows from action toward action (1987, p.258). What follows draws on their analysis.

The first use of the word ‘action’ refers to people’s experience. Horton recognised that adults have a past, and he used the pasts of the people gathered in the workshops as the curriculum. What they had done, what had happened or been done to them, what they knew, served as the subject.

Since Horton aimed to work within movements and to bring about social change he invited ‘grassroots leaders’ to Highlander. Although not necessarily elected or formally appointed, they were acknowledged as leaders by the people they lived and worked with. And because they were these kinds of leader, their pasts involved action.

Highlander looked for these leaders in the unions, the churches, existing community groups, and in the economic structure of the South. Before the civil rights movement, for example, Highlander saw black beauticians and barbers as potential grassroots leaders since they provided services for blacks that whites would not, and so were free from threat or manipulation by a white-controlled economy. A Highlander workshop in 1961 was advertised by a leaflet that called for a new kind of

leadership 'which can speak out openly, hold office in community organisations for integration, and publicly promote the cause', and it ends with the note: 'Participants: Members of the Beauticians' profession only' (Horton, Kohl and Kohl, 1990, p. 145).

Highlander chose carefully, looking for leaders who not only could bring experience and past action to the learning but would take what they had learnt back to their communities and organisations and help develop other leaders. Highlander wanted to work with people who 'had the potential for multiplying what they had learned' and who would be able to bring about basic structural change.

'Theory flows from action...' Once a group was gathered together, Highlander helped the participants analyse their experience and past actions. In the process, participants were encouraged to give their individual experiences *personal meaning* - that is, to recognise the importance and significance of the lives they had led. Then through discussion, exchange, comparison and group learning, they were encouraged to give these experiences *social meaning* - that is develop ideas and theories that could be generalised and transferred to other people and other situations.

By asking questions and leading discussion, the educators both learnt from the students and helped the students develop their ability to learn from each other. The process involved two kinds of analysis: a broader, more general social analysis in which the students and educators attempted to understand the period of history they were living in, the economic system they were under, and the ideas and values that controlled their lives; and a more focussed, detailed analysis of local situations that called for change.

For Horton, this shared analysis of experience by the educators and the students is much more than a teaching technique. It is the very act of learning. Experience not analysed is wasted. It is 'just a happening', and he sums up this idea in the deceptively simple statement:

You only learn from the experiences you learn from (Horton, 1981).

It is through his insistence that the educator learns and shares her or his enthusiasm for learning with the students that Horton exercised control over the process without dictating the outcome:

But we have to also learn from our experience and one of the things we have to do in addition to what they have to do is to learn how to relate our experience to theirs and you do that by analogy, you know, you do that by storytelling. You don't get off and say:

'Look, here are some facts we're going to dump on you.' We say: 'Oh, you might consider this. Now this happened to somebody kind of like you in a different situation. So we get them to do the same thing with each other - get peer teaching going ... (Horton, 1981).

Clearly the educator or facilitator intervenes, and Horton accepts that she or he can have information to offer that the students do not have, and may need. Horton also accepts that the educator will have an analysis or vision, and considers it legitimate that she or he share it so that, if the students want to, they can learn from it. But the key is for the educator to educate by example, to learn from and with the students and so, in effect, teach her or his own capacity to learn (Peters and Bell, 1987).

Throughout its history Highlander has offered people involved in strikes, protests and struggle an opportunity to analyse their past actions, and through this act of learning prepare to return to the struggle. This, then, is the goal of the learning - to prepare for further action. And to set as one of the goals of that action further learning. 'Theory flows from action toward action.'

Methods

Adams (1975, p. 210) describes the workshops at Highlander as 'vigorously nonacademic experiences'. Lovett, Clarke and Kilmurray (1983, p. 76) go further and point to 'an explicit anti-academic bias' in Highlander's approach. Clearly Highlander's workshops varied depending on the people gathered and the issues they faced. Some would be more general, a sharing and exploration, without a clearly defined program. Others, when participants had immediate concerns and were involved in continuing action, were obviously more focussed. From Horton's and others' accounts (Adams, 1975; Brookfield, 1983; Peters and Bell, 1987; Horton, Kohl and Kohl, 1990) the methods Highlander used were discussion, questioning, dialogue, peer teaching through comparison and story-telling, role play and rehearsal for action. Because the workshops were residential there were also opportunities for students to establish informal contacts and to set up networks, and time was set aside for learning to take place through music, dancing and entertainment.

Music and drama were important at Highlander and Zilphia Horton, an accomplished musician and singer, directed these activities until her death in 1956. She used folk and protest songs in the Highlander program, composed and took

songs to strikers on picket lines, and sang at union and civil rights gatherings. In a very tangible way she took the work of Highlander to the point of conflict, to 'the cutting edge of social change'.

Brookfield comments that 'the mechanics of a Highlander workshop, once considered so daringly radical, now seem to embody the mainstream andragogical principles of humanistic adult education' (1983, p. 116), but in saying this he ignores how completely Horton sought to combine theory with practice in the learning he encouraged.

Much is made these days of starting from where the learners are and drawing on the experience they already have. Union training, for example, often opens with exercises that draw out information about the participants and the issues that concern them. Many adult educators employ exercises that encourage participants to share their experiences, and invite participants to validate or contest what is being put forward in the light of what they already know or have done. But few courses or workshops that I have encountered in adult education or training contexts (other than those that are disguised therapy sessions) actually make the experiences of the participants the focus of the whole activity; that is, genuinely make the participants' experience and past actions the curriculum.

Certainly trainers and adult educators often seek ways of involving participants both formally and informally in the design of the course. At TUTA's residential college, course participants hold 'clearing house' sessions each morning or establish course committees to provide advice and feedback on the progress of the course. Many adult educators and trainers constantly look for feedback within course sessions and through course reviews and other forms of direct consultation with participants. But I would argue that few see democracy as so central a message and so much a part of the process in learning as those working at Highlander do. Horton recounts the story of an expert being invited all the way from the West Coast to Highlander and then, because the workshop changed direction, the participants not needing or wanting to use him; and of a senior union education officer being taken to task, then taken over and changed in a profound way by the participants of a course he had come to address.

Horton maintains that the challenge for the educator is to convince people who may have been ignored or excluded in other contexts that they can take control and that their involvement will have meaning. 'The danger,' he says, 'is not too much, but too little participation' (Horton, Kohl and Kohl, 1990, p. 134).

Adult educators and trainers may teach problem-solving techniques or see problem-solving and decision-making as a 'higher order' skill to help participants aim for, but Horton sees decision-making - real decisions that will translate into action - as integral to the process and the content of learning:

... [E]ducators should try to help people make conscious decisions at every point: long and short-range decisions, small decisions, decisions that affect only a few people and those that affect many. All of them are important (Horton, Kohl and Kohl, 1990, p.138).

As Brookfield himself recognises, most adult educators and trainers look to the educational experiences of the course or workshop itself to judge success. Only very few would adopt Highlander's position and consider social change resulting from people participating in a workshop as 'the most readily identifiable, objective, index of evaluation' (Brookfield, 1983, p. 116).

And, in a sense to return to where I began, Horton is an adult educator who faces up to, and makes educational use of struggle:

Highlander workshops are based on the mining of the experience students bring with them, their awareness that they have a problem to deal with, and the relationship of that problem to conflict (Horton, Kohl and Kohl, 1990, p.148).

Union training

Horton is important to union trainers. Here is an adult educator of international reputation who worked as a union organiser and educated unionists. He experienced raw industrial relations at first hand, and developed his thinking and his process while working to organise and empower working people in often cruel and hostile political and economic environments. (Horton also had a momentary association with Australian trade union training. In 1986 he visited Australia, and spent a morning that stretched into lunch conversing with a group of trainers at the Sydney centre of TUTA.)

Horton should be of interest to anyone involved in adult education and training, but his life and his work present the union trainer with very particular and challenging questions:

How democratic is our training? Do we use our participants' experience and past action as the curriculum? Do we help our members *analyse*? Do we encourage decision-making *at every point*? Do we teach the capacity to learn? Do we face up to

and make educational use of conflict? Do we learn, and help our members learn, at the point of conflict? Is our goal future action? Above all, do we help our members develop social meaning?

Increasingly in the nineties the larger Australian unions are providing their own training. Some, like the Public Sector Union and the Automotive, Metals and Engineering Union have conducted their own training for some years. Others, like the Construction, Forestry, Mining and Energy Union, the Finance Sector Union and the Miscellaneous Workers Union have appointed their own training officers and set up training rooms in their own premises.

At the same time the Australian Council of Trade Unions is pursuing a policy of encouraging amalgamations and affiliations of unions into industry groupings. Some of these groupings, such as the unions in the footwear and clothing industries, sponsor and conduct training for members of their affiliate unions. Here members from different unions gather together but all of them are involved in the same industry.

In keeping with these trends, in 1989 the Australian Trade Union Training Authority began restructuring its training staff into industry groupings, so that trainers became responsible for training unionists within particular industries. Before this change, most TUTA courses were open to unionists from any union, and the job representative courses in particular were attended by participants from a whole range of industries, occupations, and unions. Now many of the job representative courses run by TUTA are industry-based and attended only by unionists within that industry.

In addition to the industry courses TUTA maintains a smaller program of courses open to all unions. These are still well attended, and it is interesting to speculate why a number of different unions are still eager to send their representatives to these 'mixed' courses.

I would argue that our assessment of the value of these changes in union training depends on the goals we have. Single union training has the goal of strengthening the union so that it can more effectively represent its members. Each union needs informed, skilled members and representatives who understand the union's structure and procedures and can help it function more effectively.

Industry courses are concerned with bringing unionists together to cooperate within the industry, not only to make their unions more effective but also to make that *industry* more efficient and productive, the argument being that a more efficient industry will be of benefit to all parties.

These are laudable aims, but in both the single union courses and the industry courses the shift of emphasis is away from the members either to union effectiveness or to industrial efficiency.

Horton's process was to help people learn from their own experiences, and once they had learnt how to do this, then to get them to learn from other people's experiences. By doing this the learners developed 'social meaning' which they could use as a basis for planning future action. To do this, a mix of people with a mix of experiences and past actions was necessary.

In a single union course we can gather together people from different workplaces. And of course we can rely on union members as adults bringing a wide range of different experience and past actions with them. In the industry-based courses we can bring together people from different workplaces, enterprises and unions. But if our aim is to help educate *unionists*, if our aim is to help working men and women give social meaning to their experience as unionists, if our aim is to locate our work as trainers within a movement that is concerned with social as well as industrial change, then we should do everything we can to retain multi-union courses and we should continually look for ways of helping members from different unions *and* different industries learn together.

It is possible that TUTA might be further restructured so that by the mid-nineties most training would be conducted by unions or groupings of unions, with TUTA or what follows TUTA becoming a smaller, centralised, advisory body concerned with curriculum design. Few would dispute that unions should have access to training specifically designed for their own members, and that they should have complete control of that training. But if the program of multi-union courses disappears, if unionists can no longer easily meet together to learn as unionists first and members of particular unions second, the loss to the union movement will be enormous.

Chapter 26: Committed and Inspired Practitioners

The community development tradition in adult education is difficult to tie down, but it is peopled with committed and inspired practitioners like Horton. Here are a number of them.

Tomkins and Coady

In the nineteen twenties and thirties in Nova Scotia, Canada, Father Jimmy Tomkins and then Father Moses Coady established what became known as the Antigonish movement (Crane, 1987). Working out of St Francis Xavier University in one of the poorest parts of Canada, they developed a process of mass meetings followed by study groups, short courses, kitchen meetings, leadership schools, conferences, and radio listening groups that helped equip communities living along the eastern seaboard with the knowledge and skills to establish fishing cooperatives, credit unions and cooperative farming activities, and to engage in other forms of educational and community action. Tomkins was the pioneer, who saw the opportunity for communities to take control of their own affairs through economic and social action, and who groomed Coady. Coady was the charismatic figure who turned this economic and social action into a movement, took the movement on into the thirties, and earned for it an international reputation.

The Antigonish movement with its association with the Catholic Church was anti-communist, yet Coady's and Tompkins' methods were to address both the means and the distribution of production by establishing alternative institutions in which the fishing and farming communities - the working people actually engaged in the production - would retain control. They were educators, attached to a university extension department, but they clearly saw their kind of education integrated with social and economic action.

Coady and Tompkins regarded adult education as 'an aggressive agent of change, a mass movement of reform, the peaceful way to social change' (Lovett, 1988, p. xix). They were reformers, not revolutionaries, but they were tough characters, with a vision not unlike that of the radicals and cooperators in England a century before.

Frank Milligan

Frank Milligan, described by Groombridge (1976) as a 'practical visionary', was another adult educator who related his educational action directly to the economic conditions of the people he worked with. His approach however was very different from that of Coady and Tompkins. Where they reached out into economically depressed communities, Milligan provided a retreat.

In the UK in the nineteen thirties Milligan gained the use of a large, semi-derelict country house near Northwich called Wincham Hall and set up a residential adult education centre where unemployed men could retreat for a time from their everyday environment and, through a combination of practical work, arts, crafts and discussion, look anew at themselves and at the social and political situation of which their unemployment was a part.

From the outside, the 'program' may have sometimes seemed to have very little to do with education, since some of the activities were associated with repairing the building, maintaining vegetable gardens, and supporting the daily life of the community, and others were quite clearly recreational. But Milligan saw the distinction between work, recreation and education as artificial. Through his sensitive intervention he provided an educational depth to all the activities at Wincham, and tried 'to encourage the sometimes difficult belief that life can be enjoyed'.

For his pains, Milligan was described as an agitator. When reflecting on the incident later, it was a title he happily accepted:

The greatest tragedy of unemployment lay not wholly in its immediate evils but in that so many affected by them were content to accept them...Their patience was not of the discriminating kind and if our education made them discontented so much the better provided the ways of reconstruction were kept open. If this is what the distinguished civil servant meant when he described me as an agitator then he was right... (quoted in Groombridge, 1976, p 123).

Men who went to Wincham attested to the way their lives were changed by the experience, how they regained a sense of purpose and how they set about giving their lives direction through learning.

The Liverpool mob

The men who came to Wincham were working class, and Milligan encouraged them to develop a discriminating kind of discontentment, but he does not seem to have defined his work in terms of social class. There were others who did.

In the late nineteen sixties and into the seventies in Liverpool in the UK a group of adult educators and community activists, some working individually, some collectively, sought to use adult education in a radical way to empower working class people. People like Keith Jackson, Tom Lovett, Martin Yarnitt, Dorothy Kuya and David Evans, working out of organisations such as the University of Liverpool, the Workers' Educational Association and the Community Relations Council, ran courses, organised radio programs, set up meetings, coordinated writing groups, developed cooperatives, and helped organise community and political action. Their work has been described by themselves and by others (Lovett, 1975; Evans, 1980; Yarnitt, 1980; Fletcher and Thompson, 1980; Brookfield, 1983).

The emphases in the work of these educational activists differed. Jackson and Yarnitt established 'second chance to learn' courses using university resources. Lovett often worked at an informal level with tenants' associations and other community organisations, helping set up neighbourhood groups, instigating community action, and running educational activities in schools, private homes, community centres and pubs. Kuya focussed on questions of racism and inequity. Evans set up and conducted writing groups. But they were all working within a deprived inner city context, and most if not all based their work on a social analysis that acknowledged a clearly defined conflict of class interests.

Jackson (1973), one of the most influential theorists amongst the group, states that he and his colleagues had

no alternative but to see local people as being part of the working class, exploited more than many of their fellows elsewhere, by their social, cultural and economic environment in the centre of a large city, whose economy is shaky and uncertain ...

And he argues:

Evidence suggests that the alienation of working class students from education results from their recognition that it does not reflect their values, and is not useful in pursuing their collective interests. Educationists must therefore enter into a dialogue with working class activists and 'students', from a position of solidarity with them ... (p.38).

Jackson proposes that the three basic concerns of the 'professional in local social action' should be: *marginal reform*, aimed at redistributing resources; *political and social organisation*, aimed at releasing further resources and shifting power; and *intervention to increase consciousness and awareness*, aimed at altering social realities, 'leading perhaps to radical reform that cannot be contained within existing institutions' (p.39).

Gordon Laing

In the mid-seventies on the northern coast of NSW, Australia, a wonderful character set up a project - 'organisation' is a little too formal a description of it - called 'Educational Smorgasbord'. Gordon Laing was a retired primary school principal with silver hair, given to dressing in baggy shorts and shirts and driving around in a colourfully decorated van, channelling resources he had wrested from individuals, organisations and governments to local communities, and setting up educational activities and events. Amiable and crotchety by turns, Laing believed that people were eminently capable of controlling their own education and growth if given access to the right resources, and that there was no need for supervision or control from the bureaucrats and the experts.

For a while Laing gained use of a redundant golf club-house in the coastal town of Ballina, where resources were stored and classes and meetings of various kinds were held, and from where he sallied forth in his van to organise events such as weekend workshops on the environment, choral activities in a disused sugar mill, and night-time maths barbecues on the beach. In the eighties in the last years of his life Laing settled on a hilltop in a house filled with books and tapes and called himself 'the mountain university'.

I met Gordon Laing in 1976, and during our conversation asked him why one would combine maths with a night-time barbecue on the beach. Straight away I could see that I had asked a question to which there was some patently obvious answer

'Because of the stars,' he replied.

Laing informed his work with a strongly independent political view, a faith in people being able to look after their own affairs, and a belief in the need for alternative modes of learning. Existing institutions could not accommodate his vision of adult education, so he took action to create ones that did.

David Head

David Head is an adult educator who worked within existing institutions to redistribute their resources, and who helped one particular group of people to establish their own 'institution'.

A survey was conducted in London in the late nineteen sixties that indicated a disparity between the proportion of working class people - 'semi-skilled and unskilled manual labourers' - living in the inner London area and the proportion of working class people making use of adult education facilities. In response to this report a number of community education workers were appointed to the inner London adult education service in the early seventies with the brief of reaching these 'non-users'. One of these was Head. Working first in north Kensington, then in central London, Head provided educational activities for black groups, unemployed people, the elderly, community activists and others, always mindful that he must act as the listener, the questioner and the helper, not the instructor, and that the learners should take control of their own learning.

For several years David Head coordinated a fortnightly seminar for adult educators and community activists called 'Adult education as a community resource'. This became a regular meeting place for adult educators who were keen to understand the political implications of their work. Head completed his professional adult education career as the Principal of the Mary Ward Centre in central London, running an educational program that was a mix of conventional courses and eccentric activities aimed at responding to the widely differing community interests in the area.

To gain an understanding of his mode of working, and his ability to change peoples lives through learning, it is best to read his own account of his encounter with a group of single homeless people at the Kingsway Day Centre in Holborn, London. Writing in a ruminative style, with little apparent recognition of the degree of his achievement, Head recounts how he made contact with some single homeless people who frequented the centre; how a group gradually developed; how gradually they began to critically examine their homelessness; how they began composing a joint letter to various housing authorities describing the trap created by the hostel providers and the social security agencies - 'what you have done is turn us into hostel dwellers and force us to adopt a way of life you disapprove of'; and how some of them formed a housing cooperative, gained a property from the local council, and became home dwellers (Head 1977).

It is a case study of people at the bottom taking action through learning, and learning through action. It is a case study of people changing status through learning - from homeless people to occupiers of dwellings. It is a case study of isolated, reclusive individuals forming a sense of active community. And it is a case study of people moving from a state of fatalistic acceptance of their lot to a state of awareness and challenge.

Adult education in the developing world

Into the nineteen eighties and examples of adult education in the service of community development and social action in other parts of the world become accessible in increasing numbers to English speaking adult educators.

Some accounts are brought back. Valerie Miller, who went as a volunteer to Nicaragua following the Sandinistas' ousting of Somoza in 1979, writes with passion about the Nicaraguan Literacy Crusade, examining it as 'a national programme of social transformation intended to benefit and empower the poor and disenfranchised' (1985). Rick Arnold and Bev Burke spent from 1979 to 1982 in Central America, participating in a number of educational programs, and then returned to Canada where they ran workshops and published handbooks on a form of education that had become known in latin America as *popular education*. They list the characteristics of popular education ain this way:

- * The starting point is the concrete experience of the learner
- * Everyone teaches; everyone learns
- * Involves a high level of participation
- * Leads to action for change
- * Is a collective effort - focussing on group rather than individual solutions to problems
- * Stresses the creation of new knowledge rather than the passing on of existing knowledge
- * The process is ongoing - anytime, place or age
- * And it's fun! (1983, p.9)

The last in the list is unexpected. Learning at the point of conflict, generating what Milligan mildly describes as discontentment, can also be dangerous.

As the eighties progressed adult educators from developing countries also began broadcasting their work and ideas more widely, through the translation of books into

other languages, by attending international conferences, and by writing for journals with international circulation, such as *Convergence*.

Pumla Coleman

And some found informal opportunities to talk about their work. On a Sunday afternoon in late 1991 five of us sat in the back garden of a suburban house on Sydney's north shore talking with Pumla Coleman, a black health worker and educator from South Africa. There was a doctor there as well and we talked about health issues and the current events and changes going on in South Africa but after a while the conversation focussed on Coleman's work with groups of women from one of the 'homelands'.

Coleman is a trained nurse, but the education she was providing was much more than instruction in health care. Most of the women Coleman met had experienced a tribal education based on rote learning and the reception of a given body of knowledge. Any 'white' education they may have received was likely to have been under-resourced and in the form of a propaganda not open to dispute. Coleman set out to help the women develop a level of social awareness and critical enquiry that their other education may not have encouraged. She did this by presenting the women with photographs of riots and repression in the black townships, seeking reactions and discussion. By prompting comment and asking questions she would encourage the women to reflect on their reactions and begin seeking explanations for the scenes depicted. What is going on in this photograph? Why is the riot taking place? Who holds the power? Why should they? How can we find out more information to give us better answers? ... How can we take more control of our own lives?

Coleman works 'at the cutting edge of social change' in a land where third world and first world cohabit in a context of inequality and racism. But we can find adult educators operating in circumstances of inequality and racism closer to home.

Kevin Cook at Tranby

Kevin Cook is an Aboriginal adult educator. His people have been disempowered, dislocated, and savagely treated by the white invasion of Australia. In many cases so much has been lost that there is nothing to be won back, so Cook works to empower Aboriginal people *within* the current social and economic context. 'One of my greatest

pleasures,' he says, 'is to go into some organisation or government department and see former students of Tranby holding positions of influence.'

The Tranby to which Cook refers is Tranby Aboriginal Co-operative College. It was established in 1958 by church and union groups brought together by Alf Clint, an Anglican clergyman with strong Labor Party and trade union connections. In 1962 it became a fully Aboriginal controlled organisation, evolving into the current Co-operative for Aborigines Ltd. The other parts of the Co-operative now include a bookshop called Blackbooks, a student hostel, and the Aboriginal Development Unit which provides training, consultancy and research services to Aboriginal land councils and communities.

In 1975 Clint went looking for someone to help in the development of Tranby, and was put on to Cook.

Cook's family is from the Jervis Bay area of New South Wales. He had left school at fourteen and worked in the Port Kembla steelworks where he became a union representative. From there he moved to Sydney to work as a rigger and a builders' labourer, becoming a union representative and then a full-time organiser for the Builders Labourers Federation.

'I was in at Trades Hall and the president of the union came up to me and said: "There's this priest wants to talk to you". I had some blokes on strike so I couldn't meet him then, but we met later at the Sussex Hotel and he bought me beers all night and we got on famously.'

Cook joined Tranby and he and Clint obviously quickly developed a strong, if quirky, working relationship. 'I had been there a few weeks and Alf gave me the keys and said: "Will you open up in the morning." Alf didn't come back until three weeks later!'

Cook did a year's course at Tranby, worked for the college as a field worker, and in 1979 went to Canada to spend six months at the Coady Institute, St Francis Xavier University, Nova Scotia, studying the techniques and principles of the Antigonish movement. In the early eighties he took over as Secretary to the Co-operative.

Tranby has struggled to find funding, suffered setbacks, and experienced staff dissension. And its vigorous pursuit of its own independence in the nature of the education it provides has brought the college into potential conflict with Technical and Further Education, which funds some of its courses. Nonetheless, with Cook as the Secretary to the Co-operative, Tranby has continued to grow and consolidate itself as 'the only major Aboriginal community controlled general education provider in NSW' (Foley and Flowers, 1991, p. 91). Its current provision is a combination of certificated

courses in the areas of business studies, preparation for tertiary education, and adult basic education; courses in management for Aboriginal lands councils; access and labour market courses; and courses in Aboriginal organisation and community development. Students come from all parts of the country to attend courses at Tranby, creating a mix of Aboriginal people from traditional, country town and urban backgrounds.

Cook wants people who pass through Tranby to work with their own communities, but he also wants Tranby students to assume positions of influence in Anglo institutions so long as they understand that they have an obligation to the Aboriginal people. Preparing individuals and placing them within the wider Australian social and economic context, then, becomes an important strategy for community development. 'We'd love to see all our students employed by Aboriginal organisations, but that simply cannot happen. So what we say is that whatever people learn here they have to take back to their community. If they go into some other kind of organisation, then they must be ready to help their people and they must pass what they have learnt on.'

One of the most powerful features of Tranby is its Aboriginality. There are white as well as Aboriginal teachers, but the college is clearly an Aboriginal college under Aboriginal control: a 1991 background paper on Tranby states that 'non-Aboriginal staff have been chosen for their suitability by Aboriginal staff'. The visitor can see and feel this Aboriginality in the way courses are designed and conducted, in the way people relate and in the way the place is managed. Of educational theory, Cook says: 'We've never actually taken all of Freire or Coady or anyone else and brought their ideas back here. We've used bits and pieces of everybody over the years. We change and keep on changing. We work together a lot and use our students as teachers. This means our teachers are lucky. They learn a lot.' Of the educational style, Cook says: 'To an outsider a lot of our teaching and learning looks unstructured, but it's very structured. People may appear to be talking to each other, not listening, there may be lots of discussion. Much of our culture is oral. Most of our students are exceptionally good orally. Putting pen to paper is another matter. One of our challenges is to transfer those oral skills to written skills. We need to do that in an Aboriginal way.' Of the management style, he says: 'The cooperative form is closest to how Aboriginal people have lived. I would love to take credit for the place but we talk things through, try to reach communal decisions.' Here he grins. 'I think Aboriginal people in Australia may be in the lead. In the years to come people all over the world will have to live communally or else we'll all starve.'

Chapter 27: An Aboriginal Course

Tranby has a long association with the union movement. Unions have helped fund it from the outset, and have continued to be involved in its formal management structure. Of the twelve member Board of the Co-operative for 1990-91, for example, three were directly involved in the union movement: the chairperson of the Board was the convenor of the Trade Union Committee on Aboriginal Rights, and the other two were the President of the Seamen's Union and an official of the Building Workers Industrial Union.

And Tranby has an association with union training. In 1977 Cook attended one of the first residential courses conducted by the newly formed TUTA, and in the following two or three years Tranby conducted courses in association with TUTA on union and Aboriginal issues.

In 1986, while I was working as a trainer for TUTA, I was asked to organise a five-day course for Aboriginal unionists. (Chilla Miller, who had organised courses for Aboriginal unionists in the past was away on secondment for a year.) As soon as I asked around for help, I was directed to 'Kevin Cook at Tranby'. I had intended organising a course based on the TUTA workplace representatives course, and imagined it would contain information about unions, would look at ways of using unions and their services to guard against exploitation, and would practise the kinds of skill that would help Aboriginal unionists play a more active part in their unions and in the union movement. I went to Tranby, in the inner Sydney suburb of Glebe, to meet with Cook and Bob Stanley, then a member of the administration and now Tranby's Director of Studies

I had intended seeking their advice and help and I certainly got those, but I came away with a completely different course. The negotiation - and that is what it was - was conducted amiably but, on their side, with very little compromise. Cook and Stanley listened hard, asked questions, and slowly revealed how they could help. We discussed and reached agreement, but on reflection I realised that every suggestion they made and every undertaking they gave had been based on their judgment of the benefits that would result for any Aboriginal people involved. Courteous and helpful though they were, helping me or TUTA out did not come into the equation.

The course we designed departed radically from the one I had in mind. Instead of dealing with information and skills, the course was constructed around themes - a single and different one for each day. Monday would deal with the idea of a group, Tuesday with Aboriginal people in unions, Wednesday with Aboriginal issues, and

Thursday with gaining a voice in unions. Friday was left open. The timetable I subsequently wrote out on the standard TUTA form had a subject title entered against each session, but Cook and Stanley had indicated that each day should pursue the theme in the way the group wanted and for as long as the group felt useful. Further, they suggested that, even though I was responsible for the overall coordination of the course, each day should effectively be convened by an Aboriginal person, and that that person should be different each day. My condition here was that these Aboriginal convenors must be unionists.

The course went ahead at the Sydney TUTA centre with twelve participants drawn from a number of unions. Stanley worked with me on the first day. This involved introductions, the forming of a group and some examination of how groups work. Much of the morning was spent establishing connections and relationships, with Stanley leading. In the afternoon Stanley and I looked at group processes and how these were used in unions.

On the Tuesday, Cook led a discussion in the morning, interweaving his own union experiences with those of the participants, drawing out their feelings as Aboriginal people within organisations that were Anglo and often alien in culture and procedures. In the afternoon Cook and I used a film to describe and then discuss features of the industrial relations scene.

On Wednesday two members of Tranby staff dealt with Aboriginal issues. I did not enter the training room until late in the afternoon, and then only to discuss with the group what activities or skills they wanted to practise for the remainder of the course.

Thursday was conducted by an Aboriginal health worker from the country town of Moree. I briefed her on Wednesday evening on the group's interests and ideas for Thursday and she spent the day leading the group in speaking and meeting exercises. She ran meetings in a number of ways, comparing the kinds of discussion-meetings held in Aboriginal contexts with the more formal meetings held in some union contexts. Every person in the room spoke and was given an opportunity to reflect on how they spoke or might speak in different situations.

On Friday the group reviewed the past four days and at noon we travelled out to Tranby where the college was providing a lunch for their students, our participants and friends of Tranby. The atmosphere was informal, the crowd large, and the large majority Aboriginal. The course ended there, with those participants in the TUTA course who did not know Tranby being introduced to and, in a sense, being taken into this Aboriginal organisation.

I walked away from Tranby that afternoon feeling good. The course had been more flexible in design than any union course I had been involved in before. More genuinely than most, it had used the experiences of the participants (both their experiences as individuals and the collective experience of Aboriginal people) as its starting point. And by centring each day on a strong and respected person, we had given the course a structure and direction. Most important of all, Cook and his colleagues had altered the purpose. I had intended (and written the necessary objectives) to run a course that would help Aboriginal unionists understand and operate more effectively within the union system. We had done that but we had also helped participants examine how to use the system to benefit their people. The ownership had shifted. A TUTA course for Aboriginal unionists had become an *Aboriginal* course for Aboriginal unionists.

Chapter 28: Education and Oppression

When I interviewed Kevin Cook at Tranby he referred to Paulo Freire. Although he was making the point that Tranby did not strictly apply Freire's ideas, he was nonetheless using Freire as a kind of yardstick. Others in the field of community adult education do the same. Freire has given an otherwise disparate movement a focus, and his influence on education for community development and social action would be difficult to exaggerate.

Background

Freire was born in Brazil in 1921, and on leaving school studied law, then later sociology and education. He became a welfare officer, then moved into education and became the Director of Education and Culture in the state of Pernambuco, then Director of the Cultural Extension Service of the University of Recife.

While at the University of Recife Freire coordinated a study circle and literacy program. The program was successful and gained recognition in Brazil as 'Metodo Paulo Freire' (Jarvis, 1987, p. 267). But successful at what? Freire and his colleagues had to be doing something more than simply teaching people to read and write because when the liberal Goulart government in Brazil was overthrown by a military coup in 1964, Freire was arrested, imprisoned and then forced into exile.

Freire worked in Chile, then as his writings were published more widely, he took up posts at Harvard in the United States, then in Geneva with the World Council of Churches. Sixteen years later, with the political climate changing in Brazil, he went home to take up the post of Professor of Education in Sao Paulo in 1980. Freire has continued to be active both educationally and politically. He has written, travelled to conferences and met and consulted with adult educators abroad; in 1986 he was elected president of the council of the Institute of Cajamar in Brazil, an education centre controlled by working people and focussing on working class education; and in 1989 he supported the trade unionist Lula for the Workers Party in the first popular elections held in Brazil for twenty nine years. (Horton and Freire, 1990). One of his most recent publications is a book of recorded conversations at Highlander between himself and Myles Horton entitled *We Make the Road by Walking*, which was published shortly after Horton's death in 1990.

Freire's ideas

Freire's work and books have been enormously influential, and I believe his thinking has a direct relevance to union training. But how do we get to grips with his ideas? His writing is often abstract, his style complex, his sources of ideas and influences eclectic.

Three points before we start: the first is that Freire offers us a philosophy, not a methodology. We are far removed from the mechanistic tradition here. We and our learners have to choose and develop the practice ourselves that will suit our union and our industrial context. As Allman points out in one of her discussions of Freire:

Some misinterpretations of Freire's ideas have resulted from the failure of adult and community adult educators to distinguish between a philosophical approach to education and educational methods. Freire stresses that methods must be worked out specifically in accord with the cultural and historical context in which they are used (1988, p.95).

The second point is that we must avoid falling into the trap of adopting Freire's philosophy as an ideology. Freire does not provide *a set of ideas or rules* to believe or adhere to. Freire offers us *a way of thinking* that can inform our practice, a framework within which we can develop our own ideas. Indeed, central to Freire's thinking is the belief that an education that transforms or liberates people involves those people in understanding, demystifying and dismembering ideologies - even ideologies based on change.

...[M]uch of what Freire writes can be seen as advocating a critical investigation of the way in which ideology is embedded in common sense, magical consciousness...and sometimes even revolutionary consciousness and practice (Allman, 1988, p.94).

Point three is that reading Freire can be, for me at least, a little like reading the poet Gerard Manly Hopkins. I remember being warned that when you read a Hopkins' poem the first time it would probably mean nothing much at all. There would be all these words and rhythms, sounding beautiful but not surrendering any sense. But by reading the poem again, and again, the meaning would eventually come; that once you had developed a feeling for the language and began sensing the way the poet ordered his thinking, there would be 'an explosion of meaning'.

In something of the same way, we need to grow used to Freire's language, the absence of concrete examples, his expression of ideas in condensed, abstract phrases, and his use of metaphor. We need to recognise that he draws inspiration from European, north American and latin-American cultures; Christianity and Marx; sociologists, educationalists, revolutionaries and pacifists; and that people as diverse as Simone de Beauvoir, Herbert Marcuse, Reinold Niebuhr and Che Guevara appear in his writings as references. And we need to remember that we are reading his words in translation from a language with other cadences and other modes of expressing thought.

We need also to recognise that the language in his earlier writing is gender specific - he uses the words 'man' and 'he' to include everyone. This may be a result of writing in a latin language, a reflection of the time when he was writing, and perhaps his perception of the cultures of the people he was helping learn.

Naming the world

So...to make a start I want to examine a particular paragraph, which is typical of his language, and which I believe contains the essence of his thinking. Freire wrote a powerful little book which was translated into English and published in the early nineteen seventies. It is called *Pedagogy of the Oppressed*, and the third paragraph of the third chapter reads:

Human existence cannot be silent, nor can it be nourished by false words, but only by true words, with which men transform the world. To exist, humanly, is to *name* the world, to change it. Once named, the world in its turn appears to the namers as a problem and requires of them a new *naming*. Men are not built in silence, but in word, in work, in action-reflection (1972a, p. 60-61).

I want to work through the paragraph.

'Human existence cannot be silent...' In Brazil Freire was working with indigenous peasants, or urban poor who were a mix of displaced indigenous peasants and the descendants of slaves. The country and its institutions were in large part derived from Europe and the language was Portuguese. The elite in the country were part of that more 'European' culture while the poor were not. Freire, then, was presented with a stark example of one culture ruling, or overruling, or invading another. While

the peasants, the poor, the landless, the disadvantaged may actually have spoken Portuguese, in a sense they 'lived in silence'.

In using this image of silence, Freire is talking about more than a simple lack of access to the right channels of communication. He is pointing to the phenomenon in which one group speaks for the other, in which the elite actually describe the other group's condition, in which those in cultural, economic and political control 'name the world' for the other group. In such a situation the oppressed group has no say, not even in how they are described.

So while a district of a city might be 'home' for people, it is described and designated by those in economic and political power as a 'slum', and therefore considered not worth thinking about or servicing properly. More pernicious still, because the people there are living in silence, because their view of the world is 'nourished by false words' they unconsciously, or fatalistically, accept the description as true - and the lack of services as normal. An unemployed woman, fighting to provide for her family, is seen by the ruling culture - named - as 'unworthy', and because she has no other way of describing herself, because she is constantly described in this way, because she is required by the cultural and political system to see herself through the eyes of others, she comes to believe - and even employ - the description herself.

Self-deprecation is another characteristic of the oppressed which derives from their internalisation of the opinion the oppressors hold of them. So often do they hear that they are good for nothing, know nothing, and are incapable of learning anything - that they are sick, lazy, and unproductive - that in the end they become convinced of their own unfitness (Freire, 1972a, pp.38-9).

The woman accepts her lot, saying in effect: 'What more can a slum dweller like me expect?' A rural worker accepts removal from the land he has worked for years, saying 'I am just a peasant.'

Freire is describing the phenomenon which results in people stepping over sewage running down the middle of a street and not noticing it. Sewage in the street is 'normal'. Replanting land that produced food crops for local consumption with crops for export overseas to a luxury market is 'good economics'. People being put into gaol for stealing food to survive is 'justice'.

Analogies exist in the industrial relations scene. In some workplaces the world is named by management and the workers live in silence. Workers are designated as standardised functions rather than as people - process worker, clerk grade 2,

machinist... The procedures they go through are described by managers and supervisors who never actually do the work. Workers are disempowered and, through the process Freire identifies, come to accept this as normal. 'Why should they listen to my ideas? I'm just a line worker.' An individual's rights, her or his years of service, can be ignored in the name of 'good management'. Throwing people out of work can be called 'downsizing'. A fatalism can be heard in comments like: 'But there's an element of danger in all kinds of work, isn't there.'

Freire's next sentence reads: 'To exist, *humanly*, is to name the world, to change it.' Freire argues that people who live in silence are 'objects of social history' - that is, events occur around them and to them. They do not have a say, or play an active part, in influencing or bringing about or directing those events. For Freire, people living like this do not exist humanly. Learning for liberation, *real* learning, should result in the learners becoming 'subjects of their own destiny' - becoming active human beings who have a say in their lives and create their own stories.

As a crucial step in becoming subjects of our own destiny we must name our world ourselves. We must begin to see the world through our own eyes, not as described by someone else. We must actually see the sewage, and then see it for what it is - something *filthy*, and then register that sewage in the street is *not* acceptable or 'normal'. In a workplace, we may have a process which management describes as 'conforming to all required standards' and which we as workers accept because 'we have always done it that way' but which, when we really *look* at it, we realise is dangerous.

I came across a stark example of workers seeing their world through management's eyes in France, where a group of researchers in a university department, all scientific personnel and all aware of the long-term dangers, accepted the presence of asbestos throughout their building, even continuing to work in the building when new computer cables were being put through the ceilings and dust was everywhere. Apparently there had been concern expressed in the past, even petitions, but the university authorities had done nothing. The concern had subsided. The senior researcher I was speaking to shrugged his shoulders and said: 'But you have to understand that the stuff is everywhere.'

The third sentence of the paragraph contains an insight of genius: 'Once named,' Freire writes, 'the world in its turn appears to the namers as a problem and requires of them a new *naming*.'

If we name our world, using what Freire calls *authentic* language rather than someone else's language, we can develop an educational - and political -

momentum. Name the sewage as filth, and it now can be seen as a problem, something that is unacceptable. Name it as unacceptable, and we have another problem. Why is it permitted in our streets when it would not be tolerated in the streets of the elite? What is seen as unacceptable is now renamed as unjust. Now we have a further problem. How can we go on tolerating such an obvious injustice?

In a workplace, rename a longstanding and accepted process as dangerous and we must then rename it as unacceptable. Rename it as unacceptable and we must take action to change it.

If we can develop that momentum, then naming our world leads to action. More than that, says Freire. This critical examination of the world - *reflection* - and acting upon the world to change it - *action* - become fused into a single, continuing, liberating process, which he describes as *praxis*. Freire expresses this in the final sentence of his paragraph: 'Men are not built in silence, but in word, in work, in action-reflection.'

When talking of the power of language - 'true words' - to bring about change, Freire is speaking both literally and metaphorically. In the literal sense, he is describing how people can become empowered through gaining control over language - learning to read and write - and how this process is a political one if the language used is authentic; that is, if the learners reflect on their condition and learn to read and write about their real world, rather than learning to read and write about someone else's world, and parroting someone else's vision and views. In the metaphorical sense, when talking about 'false words' Freire is talking about ideology. The language of the dominant culture expresses a dominant ideology. Renaming the world is a process of becoming aware that there *is* a hegemonic ideology, critically analysing that ideology in order to understand how it controls one's life and thinking, and breaking free from it.

Principles and processes

To get his learners to name their world, to change it, Freire used a number of principles and processes:

Nature versus culture. Often starting with drawings of such things as a well, a brick, a tree, a village, Freire sought to help people draw a distinction between nature, which he saw as those aspects of the world which are given or determined, and culture, which he saw as those aspects of the world which we have created. His

aim was to get people to examine how they could act on the world they had created in order to change it, and how they could transcend what was given or determined.

Naive or magical consciousness versus critical consciousness. In order to act on the world, people had to abandon their fatalism, their superstition, and their assumption that other people or other 'powers' had the right to control their lives. If they could replace this naive consciousness with a critical consciousness - an alert, questioning awareness - they would come to understand how they had been conditioned, controlled and hoodwinked into thinking of themselves as unworthy.

Listening. A key skill was that of listening. Educators needed to listen to and learn from the people they worked with. Freire argued that the educator was also a learner, and sometimes used the phrases *teacher-learner* and *learner-teacher* to stress the fact that all involved learnt and changed their views of the world together. At all stages the educator needed to learn from the learners, about their feelings, their culture, their beliefs and ideas - and to do this without prejudice, by listening

Generative themes. Freire listened, not just to what was being said but to the language, for words that had a richness of meaning. He was searching for generative themes: words and phrases that, perhaps without the learners knowing, gave a clue to concerns and influential forces in their lives. A group of people might make reference to drunkenness, not as the subject of a conversation or discussion but in jokes or asides, and do so to such an extent that the listener senses a significance in this that the speakers may not be conscious of. This continual search for generative themes was a search for words and concepts upon which learning could be constructed, a search for authentic language which had a resonance and significance for the learners.

Once the educator had found a generative theme, if she or he could feed it back in some way to make the learners conscious of it, then they would begin naming, then renaming their world. Hanging around doing nothing would be renamed as inactivity, which would be renamed as a misuse of people, which would be renamed as a denial of their value.

A generative theme, when found, had a dynamic opposite to it that demanded action. Once recognised and named, injustice calls out to be corrected. Denial of value requires action to give people back their dignity. Freire argues that generative themes can be general moving to the particular, and says:

I consider that the fundamental theme of our epoch to be that of *domination*. This implies that the objective to be achieved is *liberation*, its opposite theme (1972a, p. 75).

Decoding the living code. Freire described this process of searching within the learners' discourse for generative themes as decoding their living code. Again he is using an evocative metaphor, seeing the lives of nations, cultures, classes and groups as private and closed and expressed in code, and arguing that if we are to understand them we need, with all the application that the metaphor implies, to *decode* what they are saying.

Codification. To get people to learn, to name their world, to act on it to change it, Freire used images. These were often line drawings, carefully composed to express a generative theme or to stimulate discussion that might lead to the examination of a generative theme. With a picture or a photograph or a slide, the educator presents the learners with an aspect of their own reality. Freire gives the example of an educator presenting a group of tenement residents in Santiago with a scene showing a drunken man walking along a street and three young men conversing on a corner. The group described the drunk as the only one there who was 'productive and useful to his country'. They saw him as a 'decent worker' returning home after working long hours for low wages, a man worried about his family and the fact that he could not earn enough to take care of their needs (Freire, 1972a, p. 89). From an image of an everyday feature of their lives that would normally go unremarked, the educator was able to draw out a number of interconnected themes: flight from reality, the worthiness of the worker, earning low wages, feeling exploited... Freire suggests that the educator would not have elicited any real discussion or reflection from the group if he or she had started with a questionnaire or a talk or a direct enquiry about alcohol, and then goes on:

But in their comments on the codification of an existential situation they could recognise and in which they could recognise themselves, they said what they really felt (Freire, 1972a, p. 90).

In an earlier chapter I gave the example of Pumla Coleman, the South African health educator, using photographs of riots in black townships to help groups of women engage in critical inquiry into their people's condition. In an earlier chapter still I recounted how I designed a role play for a group of union officials based on an actual dispute. In doing so I simplified the dispute and changed some of the details, in a sense decoding their union's living code and then, in the scenario for the role play, codifying themes I had picked up in conversation with the officials: concern at

the unsatisfactory outcome, the non-activist nature of much of the union membership, and the kinds of self-restraint they as officials might unconsciously exercise to protect a membership agreement with the employers.

Dialogue. Freire places huge emphasis on dialogue, on the encounter between teachers and learners in which both are committed to listening, learning and together forming an understanding of the world. Freire speaks of dialogue in almost mystical terms:

True dialogue unites subjects together in the cognition of a knowable object, which mediates between them (1985, p.49).

He states that dialogue must be based on a love for the world and people, humility, an intense faith in people's power 'to make and remake, to create and recreate', and hope. He argues that dialogue involves critical thinking, and describes critical thinking as a search for 'the continuing transformation of reality'. He contrasts 'dialogic action' which is based on understanding the world in order to change it with 'anti-dialogic action' which is concerned with accommodating to situations and becoming static and 'normalised'.

Union training in Australia makes considerable use of interactive methods, in which the trainer draws out ideas and information from the participants and constructs the session through questioning and discussion. But we must be careful not to be too smug about this. Paula Allman (1987), in examining Freire's concept of dialogue, draws a distinction between discussion and dialogue. Discussion, she says, is

a form of group communication in which participants engage in a sharing of monologues. These monologues are composed of pre-existing ideas, knowledge or questions arising which participants offer to the group.

Dialogue, on the other hand, is a process in which

...participants undertake a critical analysis of their reality and formulate explanations capable of challenging the conventional ones (p.222).

People involved in discussion, therefore, share knowledge they already have, while those involved in dialogue help each other examine their understandings of the

world, develop 'more complex and comprehensive' understandings and so *create* knowledge.

Allman speaks disparagingly of the forms of group communication in which the role of a discussion leader is to give each individual time to express her or his views, thus ensuring that discussion remains a number of monologues. She describes how a group, engaging in dialogue rather than discussion, might focus on helping one member examine his or her understanding of a particular theme or issue. This would involve all members of the group posing questions and engaging in a high degree of critical reflection both on their own interpretations and on how these relate to and illuminate the interpretations of the person in focus. Allman concludes that

...dialogue is intended to be a way of relating, one to another, the effect of which is radical because it produces the development of trust, care, collaboration and commitment amongst the participants rather than competition and individualism (1987, p. 223).

Problematizing. In dialogue with the learners the educator asks questions and encourages the asking of questions. But these questions are not designed to elicit expected answers or to encourage the repetition of given knowledge. They are questions designed to identify and clarify problems, to identify and clarify new and more interesting questions to be asked. The educator is not a problem-solver. The educator is a problem-poser.

Conscientization. Learners who name the world in this authentic way should become aware of the cultural myths and the dominant ideologies that have constrained the way they have seen themselves and the world around them, and should 'grasp with their minds the truth of their own reality' (Freire 1972b, p.76). This heightened awareness Freire describes as 'conscientization'.

We might be tempted to see conscientization as the same as Mezirow's perspective transformation. Both concepts share the idea of the learner seeing more clearly how they see the world - perceiving their perceptions - but the two concepts differ considerably. Conscientization is a group experience, the developing of a shared awareness by a group of people, by a sub-class, by a whole social class, or a whole people. Mezirow's perspective transformation is essentially an individual experience. Conscientization involves a group of people looking beyond their personal histories to the collective history of their group, their culture and their class, placing themselves in the case of Brazilian peasants for example in a 'post-colonial'

context. Perspective transformation appears to focus on an individual examining her or his own personal experience. Conscientization involves understanding the world in order to change it. Perspective transformation seems more about understanding and changing oneself. Conscientization involves becoming critically aware of and challenging the dominant ideologies. Perspective transformation appears to accept a reintegration by the individual into a society where the dominant ideology may go unquestioned. Conscientization implies political action, while perspective transformation seems more like a sophisticated form of self-knowledge, assertion and personal growth.

In the second part of *Cultural Action for Freedom* (1972b) in an essay entitled 'Cultural Action and Conscientization' Freire places his ideas within the political context of Latin-America, frankly seeing them as serving a revolutionary purpose against 'the Right'.

He applies his educational ideas to the broader concept of cultural action and describes two antagonistic forms of cultural action, one used by the Right for domination, the other available to the people for freedom. Typically, in two sentences, he summarises much of the thinking I have been trying to express above:

Whereas cultural action for freedom is characterised by dialogue, and its pre-eminent purpose is to conscientize the people, cultural action for domination is opposed to dialogue and serves to domesticate the people. The former problematizes, the latter sloganizes (1972b, p.76).

Again, there are resonances in all this for union training. Earlier I described some of the changes taking place in industrial relations in Australia. A reading of Freire would oblige us to ask ourselves a number of questions:

Are union trainers trying to help their members, workplace representatives and officials grapple with these changes by asking questions, posing problems, finding ways of getting their learners to look afresh at their past practices, their present conditions and possible futures? Are we using processes that problematise?

Or are union trainers passing on the new ideas as given wisdom and getting their participants uncritically to mouth the rhetoric of consultation, restructuring, amalgamation, new technology, work reorganisation, international best practice and increased productivity? Are we sloganising?

Are union trainers helping their participants recognise and then critically examine their own ideologies and those of managements and peak union bodies? Are we trying to conscientize our members?

Or are union trainers helping people accept changes that have been decided for them? Are we engaged in an exercise of domestication?

Chapter 29: Naming Industrial Worlds

In December 1991 I observed a three-day course attended by shop stewards and workplace representatives of a number of unions from three different manufacturing enterprises in western Sydney. There were three union trainers, and a guest speaker from the Sydney Workplace Resource Centre.

The aims of the course were to provide the participants with the necessary background information to help the different unions come together to form single bargaining units in each enterprise, and then to provide them with the information and skills necessary to conduct process analyses to progress a wage increase that would be dependant on increasing productivity and efficiency.

Each of the union trainers used a relaxed, interactive style of presentation. The trainer who took the majority of the sessions used lots of discussion, built up diagrams and images in the white board, knew and continually referred to the workplaces the participants came from, and led many parts of his sessions by asking questions. The other two union trainers were a little more formal in their presentations, perhaps because they had less time in which to be flexible, but both used and encouraged questions and discussion, and both displayed a knowledge of the participants' workplaces and working conditions. The speaker from the Workplace Resource Centre gave a set-piece address on what the Centre could do to help consultative committees carry out process analyses, but such was the mood and style of the course that the participants took him on to a wide-ranging discussion of the state of the manufacturing industry in general and the economic state of the country. The course was of a high standard throughout and, as was borne out by their informal comments during the course and their formal evaluations at the end, of real value to the participants.

Nonetheless I believe there were opportunities missed and that, if the course had adopted a more Freiran approach, another kind of learning might have been achieved. The trainers knew the workplaces and had visited them, but had they really listened to the workers there? Had they identified themes, concerns, and issues that recurred in the language, the discourse, of the union members in those workplaces?

On paper the course was tightly structured, but the trainers were forced to abandon the structure for a good part of the first day to address two major concerns in the group, both of which continued to influence the course throughout the three days.

The first concern was essentially a political one. Different unions represented in the workplaces had differing politics. In one workplace this had prevented the formation of an effective single bargaining unit of unions, and in another had resulted in the spilling of one set of workplace representatives and their replacement by another. These political differences surfaced immediately the course was convened, with members of one particular union effectively refusing to participate in one of the first course activities. The trainer opening the course dealt with the issues by getting them out into the open and discussing them. The discussion was difficult and the trainer, then and throughout the course, resorted to exhortation and examples from other workplaces to promote the idea of cooperation and the need for a bargaining unit.

If we look at this with Freire's ideas in mind then we see the trainer trying to help the participants resolve a problem by directing their attention away from their own workplaces to other workplaces and to the union line - that is, sloganising. Another approach might have been to identify the themes of distrust, political differences, and resentment at coercion by a peak union body; and to open the course by presenting the participants with one of these themes, perhaps in the form of a case study or story relating to one of the workplaces, or perhaps in the form of a diagram or picture, and so trying to get the participants to look at their own workplaces anew.

Of course this approach is more risky but if we can develop a momentum of critical reflection then learning and resolving to take action become one and the same process: we are being coerced, coercion by either management or a peak union body is unacceptable, our disunity makes coercion and intervention by union officials the only way, changes introduced in this way may not suit us or our workplace, we are the ones who know our workplace, by combining we can take control of the negotiations...

The other concern that surfaced regularly through the course related to class, background and education. The group of twenty two participants was made up of process workers, maintenance workers, clerical workers, a driver and a building worker; and from time to time different people expressed self-doubt in phrases like: 'How can we make decisions like that? We're only workers' and 'We don't have the education they do'.

These self-doubts were expressed most forcefully when the main trainer came to deal with the analysis of production. Through questioning and discussion, he drew up a diagram on the board that demonstrated the different cost components of production: wages, materials, maintenance, down-time on machinery, rejection rates,

changeover times, transport, marketing, etc. He then set about giving each component a percentage cost of the whole cost of production in order to demonstrate how small a component any increase in wages would be, and to identify other areas of cost where savings and increases in efficiency could be made. His method was to ask the group to guess what cost a particular component would be in their factory, then to record an estimate based on his knowledge of industry in general. 'What would wages cost in your workplace? 8%, 10%? Well in manufacturing enterprises as a whole wages cost all up between 8 and 15%, so let's put that up here. Now let's look at downtime. What kind of time do you think is lost on down-time?'

One participant demonstrated the self-doubt in his comment: 'How would we know that?' And the trainer responded, problem-solving rather than problem-posing, by saying: 'By going to the boss and asking. If he's fair dinkum about consultation, he'll tell you.'

If we examine this from a Freiran perspective, then perhaps the trainers should have addressed the theme of self-doubt at the outset. This might have involved exercises that got the participants to examine themselves and the people they worked alongside; and to identify the kinds of decisions they made and the kinds of responsibilities they all carried in various aspects of their family, social and working lives. It might have been useful to get the participants to examine their own workplaces, the people who currently made decisions there, and the quality of those decisions. A close, hard look at a person in authority is normally all that is needed to demystify the management role. Often a photograph or an image will do.

But if I use a Freiran framework to criticise the course, I can also use Freire to help me understand its successes. When it came to analysing the cost of production the trainer had, in effect, named the participants' world for them; but he followed this session up with a group exercise which encouraged the participants to examine their workplaces through their own eyes, searching for ways of increasing efficiency and productivity.

The group I joined started very slowly, trapped into looking for ways of increasing efficiency along the lines of the examples given by the trainer. But the group came alive when it was discovered, in a side conversation between a driver and a fitter from a maintenance team, that management was sending out moulds to be repaired off-site by another firm altogether. The group began looking at the underusage of the firm's maintenance team and facilities, and at what they saw as misuse of their transport section. More information was needed, it was decided, and the driver agreed to keep records of moulds transported off-site over the next few weeks and

report back to the maintenance team. Instead of asking cynically: 'How would we know that?', the group had set about finding out what they wanted to know. And it had not been by going and asking the boss. In Freiran terms it was an example of action in reflection, of conscientization instead of domestication.

Then the speaker from the Workplace Resource Centre gave his talk. The full group had been through the anguished first day, causing the trainers to adopt a more flexible and interactive approach than they might otherwise have done. And in the group exercises some participants had begun renaming their world: transporting moulds off-site was 'renamed' as misuse of transport and the underuse of the maintenance team; these in turn were 'renamed' as needless expense and inefficiency requiring action to correct. The participants listened for a while as the speaker detailed how the Workplace Resource Centre could help workers and management analyse their production processes so as to highlight the strong points that aided production and the weak points that hindered it. He encouraged questions and comment, and some of these questions probed the politics and policies of the Centre. The speaker was happy to respond and let the discussion move to an examination of the current jargon of the industrial relations and manufacturing scene - deregulation, import replacement, added value, etc. The discussion ranged wide and enthusiastically, until one participant asked: 'Are we meant to be talking about process analysis or politics?' I am uncertain whether he asked this with studied naivety or to end a discussion he had grown tired of. Whichever was the case, his comment marked the fact that for at least half an hour the group had been discussing, and questioning, the dominant industrial relations ideology.

Chapter 30: Theory and Practice

Freire has been around long enough for people to have mounted criticisms of his ideas. Some people are rendered cautious, even bemused, by the range of his sources. Michael Costello, in a discussion of Freire he wrote in 1986, describes Freire's thought as 'a heady mixture of Aristotle, St Paul, Hegel and J. P. Sartre' that 'is so prolix and eclectic that it cannot be adequately summarised'. Later when confronted by Freire's semi-mystical reverence for 'the word' Costello adds 'mediaeval nominalism' to the mixture.

Some critics point to the density and obscurity of Freire's writing. There is a fine irony in this. In a discussion of literacy programs linked to agrarian reform in Chile in the sixties, Freire writes of the 'very clear analysis' and the 'simplicity of expression, both profound and elegant' of the peasants taking part in the program (1972b, pp.43-45), yet appears himself to be unable to learn from this in his own writing. Freire creates a set of jargon and so lays himself open to the accusation of sloganising. And on some occasions he writes in such an 'academic' or 'abstract' style that he could be accused of mystifying the processes he is describing and so maintaining one language for an academic elite and another for the learners.

A strain of unsustainable romanticism can enter Freire's discourse and lead him into contradiction. He advocates a faith in people, their 'power to make and remake', and their 'vocation to be more fully human'. But if we have a faith in people's ability to liberate themselves, why should the educator intervene? Freire's solution to this dilemma is to engage the learners in dialogue rather than intervene in the manner of an expert authority. But he romanticises the idea of dialogue and this leads him into a kind of self-delusion:

Founding itself upon love, humility and faith, dialogue becomes a horizontal relationship of which mutual trust between the participants is the logical consequence (1972a p.64).

In some programs Freire used teams of academic experts to help him identify generative themes and understand the 'thematic universe' of the learners. These teams would include sociologists, psychologists and anthropologists, and they would retreat from the learners to analyse what they had recorded and refine their methodology. This hardly constitutes a horizontal or equal relationship with the learners.

And although Freire espouses complete respect for the learners and their class and culture there is still something of the authoritarian in him. This can be sensed in the disparaging way he refers to some learners' belief in magic, despite the fact that this belief holds an important place in their lives and cultures. Clearly he believes, in a non-negotiable, anti-dialogic way, that this kind of belief must be ousted and replaced with another kind of thinking. Here, too, he appears inflexibly certain of the kind of 'critical consciousness' he wants to develop in the learners.

One critic notes that in a workbook Freire helped design for a literacy campaign there were several exercises designed to get the learners 'to think correctly', with exactly that phrase being used in the instructions. He goes on to comment that it is 'startling' that a pedagogy which Freire says is based on questioning and does not include certainties 'in fact knows what it is to *think* correctly' (Gee, 1988, p.208).

Freire and Horton

Freire has worked at the cutting edge of social change. He has been imprisoned for the revolutionary nature of his work, has advised revolutionary governments, and since his return to Brazil has associated himself closely with unions and working people. Yet despite this thoroughly practical experience of education for social change, Freire's theories remain based on a utopian vision, a fact which he both recognises and considers central to his thinking (Freire, 1985, p.57).

This utopian vision is of a society in which both the oppressors and the oppressed have been liberated from the shackles of their false views of the world, and in which a conscientized population maintains this state of liberation and prevents any post-revolutionary situation from becoming corrupted or bureaucratised.

As the oppressed, fighting to be human, take away the oppressors' power to dominate and suppress, they restore to the oppressors the humanity they had lost in the exercise of oppression (1972a, p.32).

A conscientized population will be able to continually review, change, and update the society they have created in order to ensure that it is always a humanising rather than dehumanising one. In this way Freire sees the elite's domination of the oppressed replaced by a kind of idealistic coming together of leaders and people in a process he calls a 'cultural synthesis'.

In cultural synthesis - and only in cultural synthesis - it is possible to resolve the contradiction between the world view of the leaders and that of the people, to the enrichment of both. Cultural synthesis does not deny the differences between the two views; indeed, it is based on these differences. It *does* deny the *invasion* of one *by* the other, but affirms the undeniable *support* each gives *to* the other (1972a, p.148).

It is interesting, therefore, to compare Freire with Horton, the other adult educator of international reputation with a strong association with unions. In late 1987 Freire and Horton met at Highlander and recorded a number of conversations on to tape, 'talking a book' which was published in 1990 under the title *We Make the Road by Walking*. In this we are presented with an encounter between two people with a passionate commitment to working class people, a passionate belief in the significant role learning can play in liberation, and many common views on how this learning should be achieved. But there are profound differences between them as well. Freire's vision is more idealistic and universal, Horton's more localised and pragmatic. Freire talks of the process of people 'taking their history into their hands' (p.97) while Horton says 'I've been more concerned with structural changes than I have been with changing the hearts of people' (p.103). Freire defines the learners he works with in generic terms such as 'urban poor' or 'peasants' or 'working class', while Horton speaks of individuals, sometimes by name, as potential leaders of particular communities, unions, organisations or movements.

Freire and Horton serve as excellent foils to one another, and this is nowhere more obvious than when they share their experiences of Nicaragua. Freire offers a historical analysis of the revolution, talks of ideology, and speculates on the challenges for the educator in a post-revolutionary situation:

The revolutionary groups, the progressive groups, worked in education in order to demystify the official role of education. Now the question is not for the new education to become a kind of indoctrination, it is as political as the other was political, but now with another direction, with another dream. That is, the emphasis now, in the process of transition of revolution, is to create an education that enlarges and amplifies the horizon of critical understanding of the people, to create an education devoted to freedom (Freire and Horton, 1990, p.219).

Horton responds by telling the story of his visiting Nicaragua and travelling to a remote area on the Honduran border ravaged by the contras:

In that situation I met three or four popular educators. Two days before, they had found this popular educator who lived nearby with his throat cut, which was what the contras did to popular educators to let people know that they knew they were popular educators. (Not so incidentally the CIA claimed to be the policy maker for the contras.) As I looked at the man's grave, that simple grave where his neighbours had buried him with a little wooden cross on top, I was filled with tears and filled with anger, knowing that our government was really responsible for that man's death. But the fact that there were people even within sight of that house who were continuing to do popular education meant that they had moved way beyond what we've talked about up till now, in terms of being effective and reaching the people. They had committed their lives to it (p.224).

Freire and union trainers

Freire probably cannot be applied directly to union training. His analysis of class and oppression is essentially historical, when we need one that is more economic and structural. And his romanticism, his intellectualism and the utopian vision can lead him into contradiction and put him out of reach. But they also give him his unflinching commitment and passion for education and learning, and if we read him, looking for analogies, resonances, echoes, parallels - as I have tried to demonstrate from time to time above - then he can provide us with a new kind of framework in which to think about our practice, he can provide us with insights, and there will be times when he can inspire us.

I asked a group of union trainers to participate in an exercise making use of some of Freire's principles and processes. We talked very briefly about Freire, simply who he was and a little about his career. Then I asked the trainers to work in pairs, and each in turn talk to their partners about their work. I asked the listeners not to interrupt but to listen as hard as they could; and I asked the speakers to talk about their unions, their training, and their participants. The speakers had ten minutes, then they were to change roles, becoming listeners while their partners spoke.

We came out of that stage and discussed the process of listening, and the effects on both the listener and the speaker. No one had had trouble speaking for the ten minutes, and we noted how the listener created a vacuum of silence which the speaker was encouraged to fill.

The discussion was brief, and we moved into the next stage. Here I asked the trainers to withdraw by themselves for fifteen minutes, leaving the room if they wanted, and review in their mind what their partner had said. They were not to dwell

on the substance of what their partners had said but to try and recall the language they had used. They were to note down any recurring words, or significant phrases even if their partners had used these words or phrases incidentally.

One or two looked sceptical at the beginning, but no one seemed to find the fifteen minutes allocated for this phase too long. Certainly, when we reassembled in the room I felt I had everyone's full attention.

We continued our discussion of the process of listening. How often do we really listen to our members and how often do we create the right conditions in which they can speak? When we do listen, what do we listen for? How do we listen for concerns that we do not already know? Here we talked about Freire's idea of searching in the language for words with a resonance, for recurring themes.

I asked the trainers to go back into their pairs. This time they were to share their reflections on each other's language, and through discussion try to verify if the words or recurring phrases did give a clue to any concern. I asked that each person ask questions of the other but try not to offer his or her own interpretations. The questions were to be a mode of improving the listening. I suggested that, working together, they should try to reduce the number of themes for each person in the pair to a workable number. I did not set a time for this, but brought it to a close when all nine pairs indicated they were ready to move on. This phase took at least twenty minutes and at no stage did I notice the exchange in any pair flag.

We talked about how questions might be used, about Freire's idea of dialogue, and how he used listening and dialogue to identify generative themes. I talked about Freire's idea of decoding the living code, then re-presenting the learners with that theme in the form of a drawing or a photograph, and gave the example of the image of the drunk and the three people in the street. We talked about naming and renaming the world. Drunkenness, flight from reality, waste of a worthy person, hardship, exploitation... The group discussed the feminists' struggle to reclaim the language; how the use of the masculine pronoun forced women, in Freire's terms, to live in a culture of silence; and how by changing the language women were renaming their world in order to change it. We talked about language in the workplace, about who coined it, and how it could be used as a medium of mystification and control.

I asked the trainers to work individually again, and in private. They were to reflect on their dialogue with their partners and try to identify one central, potentially dynamic theme in their partners' discourses. They were then to try to represent that theme in a line drawing. The line drawing could take any form - a diagram, a picture, a composite of images, a cartoon with words. For those who might not want to draw I

suggested the option of using a metaphor or searching out and locating an object but no one took up the offer.

No one demurred. No one joked about returning to kindergarten. The application at this stage seemed intense and complete. People took their time, reviewing their notes, reflecting, drawing. We waited until everyone had finished drawing.

I then asked the participants to arrange themselves in their pairs again, and for each in turn to show the drawing to his or her partner. I asked them to resist the temptation of explaining their drawings to their partners. Any truth in this exercise would not be in the drawing but in the partner's *reaction* to the drawing. I asked them to use dialogue to help the partner explore his or her reaction. If the partner said the drawing had missed the mark, then why? If the partner was initially mystified by the drawing, then ask what various features of the drawing could mean, how would he or she have redrawn it, what part was particularly mystifying. If the partner responded favorably or strongly to the drawing, then why? What would you add? How would you develop it?

We left a reasonably open-ended amount of time for this, and I suggested that once both partners had explored the drawings, they try through dialogue to help each other take any insights further, to name and rename their worlds, to get that momentum if they could.

The group was made up of representatives from a number of unions. There were people from local and federal government white collar unions, a building worker, metalworkers, an airport worker from Fiji, a nurse, a teacher and a TUTA trainer. As the first member in each pair revealed his or her drawing to the other, there was a buzz in the room - audible reactions, surprise, laughter, rapid talk. The buzz of conversations continued with little sign of diminishing until I was obliged to call the full group back together again.

I can only finish this description with anecdotal evidence of the effect of the exercise. It was agreed that what had been discovered or revealed in the exercise should remain the property of each pair, and that we should talk about the exercise, and the possible application of some of Freire's principles and processes to our work as union trainers. People wanted to talk. 'It's uncanny,' said one. 'I'm beginning to see my relationship to the members I train in a different way,' another said. 'I couldn't believe I'd been using those words,' said someone else. We talked about using photographs and drawings of workplaces to depict power relationships. We talked about learning to ask questions that posed problems and led on to other questions. We talked about really 'seeing' things for the first time and understanding why we had

not been able to see them like that before. We talked about getting others to 'see' things for the first time - dangerous work practices, inequity, prejudice, poor union organisation. Some had found the exercise insightful, others merely an interesting process in aiding reflection and encouraging communication. No one had found it unhelpful. And everyone seemed fascinated by the concept of naming the world.

Some of the participants were full-time trainers for their unions or for TUTA. Others were organisers with a part-time interest in training. I rang one of them a few weeks after the course. She told me that up to the course she had been training part-time but that the exercise and subsequent discussions had helped her make the decision to ask her union executive to commit her to training full-time.

Chapter 31: Finding Voice

In this chapter I want to turn to an adult educator working with an underclass that lives in silence in the developed world.

Jane Thompson is a feminist and in her educational thinking and practice a separatist. She is a compelling social critic and a passionate advocate of a different kind of education for women. Her separatism does not take the form of a retreat but is offered as a challenge. Keys to her thinking can be found in her book *Learning Liberation* (1983), and a feeling for her practice and the kind of learning it results in can be gained from a book she co-authored with seven other members of the Taking Liberties Collective called *Learning the Hard Way* (1989). Thompson ranks with Freire and Horton in providing inspiration for adult educators engaged in community, social and political action.

For union trainers Thompson provides inspiration on two levels. She offers ideas and analysis that can be directly applied to the training of women unionists where those women are seeking to empower themselves as women within the union movement; and she offers ideas and analysis that can, by analogy, be applied to the training of unionists, women and men together, in their struggle to gain a greater say over their working lives.

In 1979 Thompson, working out of the Adult Education Department of the University of Southampton in England, established a course entitled 'Second Chance for Women', and in 1981 played a central role in establishing the Women's Education Centre in Southampton. Both the course and the Centre can be associated with the growth of women's studies that took place in the UK, the United States, Australia and elsewhere in the seventies; and the Second Chance course in particular had quite clear antecedents in other institutions in England and the United States. However, both initiatives had features that make them unique.

Women's studies and courses for women

In the nineteen-seventies courses for women and about women were on the increase. In universities women's studies courses were gaining a foothold, although often only a precarious one. Some universities and colleges were introducing courses for women seeking re-entry to study or re-entry to work. Some colleges and training centres were providing courses in vocational training in fields formerly not open to women. And the programs of many adult education centres included courses with a

'women's studies' slant under titles such as 'Language and Gender' or 'Images of Women in Literature' or 'Psychoanalysis and Female Identity'.

Thompson was dissatisfied with many of these developments, which she later describes as being part of 'the respectable face of feminism' (Thompson, 1988), since they did not call into question the construction of male-centred knowledge, or only did so half-heartedly. Many of the adult education courses simply embellished existing disciplines, rather than examining those disciplines in order to understand how they had been constructed to exclude women and women's experiences in the first place. Most of the re-entry courses were aimed at helping mature women fit back into a wider economic, industrial or social context after a period of isolation as child-rearers, without questioning the reasons for their isolation or critically examining the system they were returning to. And although some of the courses at universities espoused radical feminist principles, many existed marginally within universities and so had little influence beyond the people immediately involved in the courses themselves.

Thompson describes this so-called 'enlightened' approach of tacking women's studies on to an already existing program of courses as being

...based on opportunism rather than commitment. So long as women's studies options exist, the rest of the curriculum which is not women's studies, and the structures in which knowledge is constructed, managed and transmitted, can remain unchanged (1988, pp.190-191).

Women's oppression

Thompson argues that women have been defamed, discriminated against, excluded, and victimised.

So long as men have been powerful, they have used their power to describe the world in their own terms; to create, confirm and reinforce the knowledge which has concerned them historically...

The history of humankind has been a history of the progressive elimination of women from the public counsels and the public affairs of men...

Denied access to male deliberations and the distribution of power, we women have become the victims of decisions made *for* us and of definitions *about* us (1983a, pp.109-110).

Thompson backs up these views with a powerful amalgam of historical and sociological analysis, reference to feminist research and other feminist writers, and vivid personal accounts written by women from working class and other backgrounds; and she calls for a kind of education for women that will involve 'a radical redefinition of subject matter, different lines of enquiry and new ways of learning' (1983a, p.111).

Two courses

In tracing her moves towards establishing this kind of women's education Thompson looks closely at two particular courses in the UK that preceded her program in Southampton:

The first is the 'Fresh Horizons' course offered from the early seventies at the City Literary Institute in London. This course was aimed at people wanting to make a fresh start in education and was open to both men and women, although more women than men enrolled. Normally the course met one day a week over a year and introduced students to study methods and certain subjects such as history, literature and sociology.

Thompson notes that the course was attended mainly by middle class people, and was thoroughly within the traditional liberal academic tradition. Since it did not challenge the kind of learning or the kind of knowledge which made up this 'male academic tradition', the course could not be described as feminist, but Thompson recognises that the Fresh Horizons course did take women's rights to education seriously; it did acknowledge women's domestic responsibilities without defining

women in terms of those responsibilities; and that for some of the women participants it had a politicising and consciousness-raising effect (1983a, p.103).

The second course is called 'Second Chance to Learn' and was established in 1976 as a joint venture by the Liverpool University Institute of Extension Studies and the Workers Educational Association in Liverpool. This course was much more firmly rooted in working-class traditions, and associated with trade union activities and the informal community education programs in Liverpool referred to in earlier chapters. One of the founders of the course states that its shape and outlook was 'a consequence of a prolonged *political* relationship between professional adult educators and local working-class organisations and networks' (Yarnitt, 1980, p. 176).

The aims of the Second Chance to Learn course were twofold: to provide the opportunity for re-entry into education for those who wanted it; and to help develop working-class activists able to work in a more skilled and authentically informed way within their own communities. To this end the 'content' of the course was closely related to the lives and cultures of the people attending. Emphasis was placed on the history of Liverpool and the history of the working class in Liverpool; and issues that most urgently concerned the participants or influenced their lives - unemployment, racism, sexism, economic and political oppression - were discussed and studied. Examining local issues might lead to a study of economics as a tool to assist in the analysis. A study of local history could demonstrate the usefulness of developing further skills in historical research and sociological and political analysis. Thus, while the courses were conducted with academic rigour, with participants relating to individual tutors and being required to produce regular written work, the academic disciplines were subservient to the issues of concern to the students.

Thompson is in close political sympathy with the 'Second Chance to Learn' course. She sees it offering access for working-class people to an education system they help pay for but often get very little value from, and doing this with full regard for the working-class interests and political aspirations of the students and their communities. As a result she places 'Second Chance to Learn' in the same tradition as the independent working class education of the Chartists in the last century and the National Council of Labour Colleges in this century.

Thompson presents this association with independent working-class education as a major point in the course's favour, but it also leads her to express a major reservation. Independent working-class education, she states, is 'essentially a male tradition' and, although half the students in the 'Second Chance to Learn' course

each year were women, there remained the danger that their experiences would be subsumed within the general, male-oriented trade union and working-class issues canvassed and examined in the course.

Thompson, then, finds faults and favours in the 'Fresh Horizons' and 'Second Chance to Learn' courses. And there is one particular element in both these courses of which she is particularly wary.

If these courses prepare people for new roles, as students, as employed people, as working-class activists, as unionists, then we need to ask: who defines the role? For a woman, if the role is still defined by a male-dominated world, then she is caught in a double bind. For many women the solution is to take on the new role while still performing the old one. She becomes the performer of unwaged household duties *and* community activist, parent *and* student, or supportive marriage partner to her husband's profession *and* full-time professional herself.

By offering a form of role education, many of the women's studies courses in universities, colleges and adult education centres, the Fresh Horizons course, and even the Second Chance to Learn course in Liverpool were still missing the point:

Unless women think much more deeply about themselves, make sense of their experience and expectations in reference to their own needs and interests, and consider strategies for redefining the relationships with men in ways that will change the distribution of power and oppression to one of equality and respect, learning new roles will continue to be a poor substitute for the practice of freedom and liberation (1983a, p.106).

Second Chance for Women

In setting up the Second Chance for Women course Thompson made two significant decisions: she would recruit women only; and these women would be working-class. This exclusivity gave the course a social and political focus. Subjects, topics, areas of study and activities were chosen, not because of some supposed intrinsic academic value or 'social relevance', not in order to help the participants take on new roles, but because they enabled participants to examine

...the shared condition of being female in our society, ... how sexism and patriarchy operates, what the consequences of this might be for ordinary women and what, if

anything, can be done to escape from the limited and limiting expectations which a society like ours still reserves for women (Thompson, 1983a, p.152).

The participants met for one day a week, with creche provided and fees waived if necessary. The mornings involved an introduction to the study of law, literature, sociology, politics and history, but this was done not by addressing the subjects as discrete bodies of knowledge but by examining themes such as family life, employment, women's struggle for the vote, the politics of welfare, and inequalities arising out of class, race and gender. The approach was interdisciplinary, and team-teaching was used so that members of the staff related to each other and to the participants in dialogue and discussion, rather than lecturing as individual specialists. A resource pack of reading material was provided for each session but the examination of a theme or discipline 'relied profoundly on the experience of the women in the group'. When dealing with the health service, for example, the group could start from personal accounts of their own encounters with the system as patients, nurses, cleaners and ancillary workers.

The afternoons were conducted as workshops. All participants took part in a writer's workshop, and could choose from a variety of other options such as a film group, a radio workshop and 'an oral herstory group'. The writer's workshop did not focus on grammar or expression or encourage participants to produce fictional work in the conventional 'creative writing' sense. Its main concern was

...to explore the condition of being a woman in our society through discussion and personal writing about first hand experience (Thompson, 1983a, p.167).

From these workshops came a forceful and moving body of material upon which to build the course (and the publications I listed above): personal accounts - sometimes in poetry as well as prose - of childhood, school, encounters with prejudiced bureaucracies, experiences of victimisation at the hands of the legal system, sexual harassment and violence against women at work and in public places, domestic violence, personal struggles, oppressive and successful relationships, and individual and shared achievements.

The mornings, then, were planned by the tutors and dealt with analysis. The afternoons were in the hands of the participants and provided personal, original material to further inform that analysis. As a whole the course appears to have offered an inspiring mix of 'really useful' information, relevant themes and personal

stories; and to have stimulated learning by enabling participants to affirm their individual identities and come to a collective understanding of injustice.

Thompson's theory and practice

Thompson has affinities in her approach and thinking with the principles and processes of Freire. She sees women as oppressed, and that oppression coming about because they are described by others:

As women, we scarcely know what we can potentially be - so used are we to being defined and circumscribed by our relationships with men (1983a, p.106).

The writer's workshops were designed to address this disempowerment by encouraging the participants to tell their stories and name their world in their own language. The course as a whole identified and then pursued themes. These themes were presented as problems and analysed through discussion and dialogue. And the aim of the course and its organisers was clearly to help the participants achieve a level of personal, social and political awareness far closer to Freire's concept of conscientization than Mezirow's perspective transformation.

Thompson also has affinities in her approach to the practice of Horton. We could describe the process in the Second Chance for Women course as one of giving personal meaning to personal experience, sharing these personal meanings through story-telling and peer teaching, transforming them through comparison and generalisation into social meaning, then using that understanding of social meaning to plan future action. Like Horton, Thompson would listen and question, but had no compunction about sharing her own vision.

Thompson, however, is an original educational thinker and practitioner and differs in significant ways from Freire and Horton. Indeed, despite (or perhaps because of) her focus on one gender and one class, in a number of respects she is broader in her thinking than either of them.

Freire's analysis of oppression, for all his reference to Marx, is essentially a cultural and historical one. Oppression is explained in serf-master terms, then in colonial terms, then in post colonial terms. Horton's analysis is a structural and economic one. He sees capitalism embodied in multinationals, monopolistic business, absentee landlords and right-wing governments denying working people real, that is, economic democracy. Thompson combines a structural and economic

analysis of class oppression drawn from Marxist and socialist theory with a feminist historical and cultural analysis of the oppression of women. She draws on the ideas of people like Gramsci, Bowles and Gintis, and Jackson in a discussion of adult education and the concepts of class and disadvantage (Thompson, 1980), and then takes these ideas on into her subsequent feminist analyses of adult education, drawing on a range of feminist historical, sociological and political theory (Thompson, 1983a, 1983b, 1988, Taking Liberties Collective, 1989).

More than Freire and Horton, she values study in an academic mode, so long as the rules and requirements of academic disciplines are made subservient to the real-life concerns of the women engaged in the study. She is contemptuous of the kind of adult or community education provision in which education is downgraded or not even mentioned for fear of frightening off the learners; where the emphasis is on bringing people together in a community centre or a health clinic for a cup of tea and a chat; and where the role of the teacher is to facilitate and contain rather than help the learners engage in critical analysis and contemplate taking some kind of action (Thompson, 1988, p. 189).

Rather than being non-academic or anti-academic, Thompson encourages the women she works with to critically examine existing academic disciplines in order to establish how they exclude women and women's experience, to attack the concept of specialism inherent in the system of academic disciplines and, through reading, writing and original research, to create new interdisciplinary knowledge. In this way Thompson seeks to work alongside her students in order to create a new kind of curriculum that is academically rigorous but freed from conventional, patriarchal forms of control and bias. This kind of academic study is no longer staid, contained, or safe:

The combination of exploring and creating knowledge about women, with women, for women, and in a way that values women, and makes bridges between us is, I think, a dangerous and revolutionary business so far as patriarchy is concerned, but liberatory so far as women are concerned (Thompson, 1983a, p.159).

Central to Thompson's practice is the discovery and affirmation of identity. Freire's conscientization is a group, or class, or even - in theory at least - a national process. Horton's starting point is a person's past actions and, although he is deeply respectful of individuals, he is often seeking representative people with representative experiences. Thompson, however, aims to help individual participants

in her course 'define their own needs, express their own personalities and discover their own identities' (1983a, p. 158). From the accounts quoted in her books this can clearly be an intensely personal experience, but Thompson takes the process far beyond that of a personal growth course by locating this affirmation of identity within a feminist analysis of relationships and a feminist critique of society. Individual women affirm their identities in solidarity with other women, and conceptually with *all* women.

This affirmation is expressed in poetry and writing. Although Thompson is careful to distinguish the writer's workshop in the Second Chance for Women course from creative writing courses that concern themselves with fiction, she nonetheless encouraged participants to write in forms - verse, reflective prose, narrative, description - that could be highly personal and emotive. It seems she found a powerful formula for learning in the combination of rigorous conceptual analyses of the morning sessions, and the release of individual expression in the afternoon workshops.

Thompson recognised and used anger. She sought to release women's anger at their oppression, clarify it, and then use it to motivate their learning and action. But we must not confuse her use of anger with the kinds of cathartic or explosive releases of anger that happen in some kinds of 'anger workshops' or pseudo therapeutic 'courses'. Thompson was perhaps at her most politically pragmatic in her use of anger:

Growth through anger, focused with precision, can be a powerful source of energy, serving progress and change. Anger expressed and translated into actions in the service of women's visions and women's futures can be a liberating and strengthening act of clarification, for it is in the painful process of this translation, that we identify who are our genuine allies and who are our enemies (Thompson 1983a, p.54).

Anger will enable rebellion. Thompson uses the word 'rebellion' to describe the kinds of action women need to take to overcome prejudice, institutional discrimination, and straightforward restriction and control. She distinguishes between true and false rebellion. There are those who espouse feminist views and in the process build successful careers within institutions or systems that remain unchanged. Courses on women's studies (and race relations and working-class history) are introduced into educational institutions without any real change to the dominant ideology that informs the everyday life of that institution. Thompson points out that patriarchal institutions incorporate women by rewarding them for 'good'

behaviour, so she calls on women to engage in true rebellion by exposing hypocrisy in those institutions, fighting to redistribute resources, reserving their loyalty for principles and other women, and subverting men's views of themselves and of women 'by behaving badly and with irreverence to their rules' (Thompson, 1988, p. 194). In Australian terms, Thompson advocates that women calculatedly jack up.

This argument leads Thompson to her educational separatism.

It is only when women cross the line drawn by patriarchy and choose to do things on our own and when our collusion with racism, homophobia and class oppression can no longer be guaranteed, that real resistance and real possibilities begin to emerge (Thompson, 1988, p.200).

In arguing for a separate education, Thompson is more intransigent than either Freire or Horton. Freire entertains a romantic concept of a kind of reconciliation in some of his writing. Both the oppressed and the oppressors are caught in a trap from which a fully conscientized population will somehow be able to release them. Horton recognised enemies, would not consider compromise, but would continue to argue with them. Thompson, however, counsels a rejection of men in educational terms, and then subsequent contact only on very clear conditions. Women need to conduct their own education, control their own educational resources, do their own teaching, and to develop their own knowledge and educational tradition. From this position of autonomous strength it would then be possible

...to renegotiate relationships with men in our personal lives and in society generally; make strategic allegiances where appropriate with those groups, including men, who are concerned to challenge prevailing oppression; and to include men in our activities only when they come to learn, or to offer support, rather than to interfere and control (Thompson 1983a, p.204).

Thompson's educational thinking, therefore, is separatist, while her feminism is not as clearly so, although she does seem to shift closer to an overall separatist position in more recent writing.

This educational separatism was expressed in the setting up in 1981 of the Women's Education Centre in Southampton to house the Second Chance for Women course and other courses and activities that would deal with women's concerns as they were defined by women. This centre experienced attempts by various authorities to locate the control in externally appointed management committees, to remove

funding and resources, and to control its publicity, but functioned for some ten years offering courses and other educational activities open only to women and exclusively controlled by women. Sadly, the various attacks on the Second Chance for Women course and the Women's Education Centre, chronicled in *Learning the Hard Way* (1989), tend to confirm Thompson's views of the mean-mindedness of patriarchal institutions and patriarchal society. In September, 1990, faced with the choice of continuing the Centre in a modified form or closing down, the women involved in the Centre closed it. We need to see the experience as ten years of success, and to understand the closure as a statement of principle.

Chapter 32: Feminism and Trade Union Training

Simply by providing such a forceful feminist analysis of adult education, Thompson provides ideas and challenges for union trainers. Her analysis includes a brief examination of the history of women in the British trade unions (Thompson 1983a, pp.72-74). She is clearly committed to the principles of trade unionism, but deeply critical of the fact that at times in their history trade unions have excluded women from membership and from certain kinds of work, and that today many remain patriarchal in policy and culture. Similar criticisms can be levelled against unions in Australia, since our peak bodies are dominated by men, men hold the senior positions in most unions except those whose membership is almost entirely women, and the 'movement' as a whole continues to present a patriarchal public image.

For union trainers in general, then, a reading of Thompson would encourage us to examine the values underlying the courses we design and our mode of delivering those courses. How are women represented in the case studies we choose? How do we ourselves relate and respond to gender in the training room? Do we unconsciously favour men, that is, give them more 'air time' than women in the training room in the way research indicates many educators do? Is there a gender bias in the way we recruit members for training courses? Do we consign gender issues to discrete sessions on equal employment policy and legislation, or do we try to make a concern for equality inform our whole discourse and behaviour as trainers? Do we approach the question of women in unions with a male-inspired 'self-interested chivalry and misplaced moralism'?

It is not so long ago that I witnessed a course advertised exclusively for women unionists which was designed and conducted by two male trainers. The trainers explained that the course would provide an introduction to the union movement, its aims and composition, an introduction to the industrial relations system as a whole, and practice in speaking skills. They did not envisage examining reasons for the lower membership of women in the unions, nor canvassing the experiences of the participants themselves as women workers and unionists in male-dominated environments. And they had drawn exercises from standard union training courses without rewriting them. The course appeared to have the characteristics of an exercise not in the education and empowerment of women unionists but in their domestication.

Of course, for those women union trainers working with women unionists, or in unions with a predominantly female membership, Thompson provides a theoretical

framework, a guide to a body of knowledge about the oppression of women in personal, political, economic and social contexts, and a range of ideas for course design and methods that may help empower women within the world at large and as women within their unions. It is these ideas I have tried to describe above.

But, as I stated at the beginning of this chapter, there are features in Thompson's educational thinking and practice that can inform union training for both women and men. Most important amongst these are her emphasis on identity, her use of anger in the educational process, her reclaiming of academic disciplines and, ironically, her case for separatist education.

Earlier in this book I talked about a general union culture and how that culture can give a group of participants from different unions a sense of common purpose. Clearly trainers welcome this feeling of solidarity, making use of it to transcend political differences and to establish a suitable climate for learning. But how many of us exploit this heightened sense of unionism directly, making it a central and substantive feature of the course?

If we took a leaf from Thompson's book then, having brought a group of unionists together, we would start by helping them discover their identities as unionists. This might involve encouraging them to reflect on their experiences as unionists; on the kinds of reactions their being unionists elicited in colleagues, other unionists, management, friends and family; on how they behaved as unionists; and on the degree of their commitment to the principles of unionism. By encouraging them to recount and compare some of these reflections we would hope to construct a common understanding of what being a unionist meant. From an examination of individual union identity we would aim to move to a sense of shared experience within the group, and from there to a feeling of solidarity with *all* trade unionists.

People come to union training with a number of identities. They are workers with different skills and designations, people with personal relationships, people with roles in families, people with positions in other organisations and groups, and people with particular interests, commitments and activities. In my experience it is common for participants to be distracted by these other roles or identities. It is not unusual for someone to remark that he or she will be able to use what has just been learnt in some other context. 'I'll try out that technique the next time I'm chairing the finance committee at the club.' 'That model might help us settle a dispute we're having with our neighbours.' Beginning a course by concentrating on helping participants define their identities as unionists would bring the course into focus.

Unionists can feel beleaguered. Industrial action, for example, is often reported without an explanation of the dispute that brought about the action. We have every right to feel angry at this kind of misrepresentation. Attempts are regularly made by employer bodies, managements, and some political parties and governments to erode unions' rights and curtail their powers. We have every right to feel angry about these attacks.

A large company worked with its unions to establish consultative mechanisms in the late eighties, then in 1991 suddenly introduced contract labour into one of its plants without any consultation at all. Another large company consulted with its unions in a particular plant to introduce new work and management practices, expressing satisfaction in writing towards the end of 1991 with the progress being made, and then in 1992 suddenly performed an industrial flip-turn, refused to consult further and set about provoking confrontation with its workers. We have every right to feel angry at these kinds of trickery and betrayal.

Unionists can feel cheated. In Australia through much of the eighties unions kept to the Accord with the Labour government and exercised considerable wage restraint, with the result that many companies by the mid-eighties were showing increased profits. But instead of this being a period of reinvestment to modernise plant, increase production and so improve wages and increase jobs, the second half of the eighties was marked by intense non-productive entrepreneurial activity by high profile corporate figures, resulting in the accumulation of massive debts and spectacular bankruptcies. Many of the profits were invested offshore, with one major corporate figure openly using the threat of massive offshore investment in an attempt to influence government policy. We have every right to feel angry at these examples of 'free' enterprise at its most selfish.

If we were to draw on Thompson, we would examine the media, look at employer body policy and tactics, examine regressive industrial relations legislation, look at corporate behaviour, and examine case studies of broken agreements. By focussing our anger we would aim to motivate participants to examine the ideologies that informed these examples and so move on to study and develop their own social and political theories.

Continuing to draw on Thompson's example, we would use a combination of personal accounts, readings and research by the participants to achieve a level of academic study, but of disciplines that had been reshaped or reclaimed or rewritten by the participants themselves. In doing this, our participants, like those in the Second Chance for Women courses, would also be developing and practising the

skills of description, comparison, classification, reflection, analysis and synthesis, research skills, and skills related to planning and engaging in social action - all skills needed to *create* knowledge.

And to do this, unionists would need to meet separately. At the moment, even in union quarters, there are advocates of joint union and management training. It is argued that if management and unions are going to consult together, they may as well be trained together. In 1992, for example, TUTA reported that its newly formed National Project Unit provided joint training related to consultation and workplace change in a number of enterprises. But this approach may lead us to ignore or deny the fact that certain of the interests of the two parties, even if they agree to joint training, will remain different. If we are really going to understand our condition as unionists, if we are going to challenge systems that allow small, unrepresentative bodies of people on company boards to make decisions that can affect the lives of thousands of workers, if we are going to examine the distribution of power in the workplace, and if the trainers and participants are going, freely and unfettered, to share their visions, then the training needs to be conducted by unionists, on unionist ground and with only unionists present.

In all the talk about consultation between worker and managers, the major issue is rarely addressed. Management may hand over some of the decision-making to workers on the shop floor and may agree to consult about work practices, new technologies, methods of production and even enterprise policy but as yet very few have talked about sharing the actual ownership of their enterprises. Training constrained by the presence of management can only deal with the techniques of participation and will be unable to canvass the redistribution of responsibility, control and wealth that would mark a genuine participation by workers in the affairs of an enterprise.

Thompson provides a persuasive argument for separate education in another context, but her arguments transfer well. It is only when unionists are operating from a basis of strength and development, and of intellectual autonomy, that we can safely enter into strategic alliances with people whose interests are not our own.

Chapter 33: Enrolled Nurses' Conference

Ruth Shepherd, Professional Officer with the Victorian branch of Australian Nursing Federation (ANF), sent me this account of a training event she organised in 1991:

“ANF decided to run a conference for Enrolled Nurses (ENs), as nothing of this sort had ever been done for ENs before. This would be the first.

ENs are what used to be termed the ‘nurse’s aide’, and are a vital part of the nursing team, providing basic nursing care. ENs remain a largely non-unionised workforce in the health industry. There are about 25,000 ENs working in Victoria, and only about 5,000 of those belong to a union (about 2,000 to ANF).

One of the motivating factors behind running the conference was recruitment, but also to provide a forum for recognising and celebrating the role the EN plays in the nursing team, by acknowledging their value and importance. We wanted the ENs to leave the conference that day feeling good about themselves as people, and as nurses.

While the topic of the conference - ‘Promoting Enrolled Nurses...*Professionally*’ - was the main avenue for the delivery of this message, we were very aware of the other more subtle messages that are sent by the venue and the food. We determined to have a good venue, and hired a proper auditorium with good sound, comfortable seating, good lighting and amenities. We also had a registration desk, conference folders and information, and had decorated the entrance hall with life-sized statues of women (hired and delivered at reasonable cost), and trade displays. We treated them like royalty as they arrived.

We then made sure that the food was of excellent quality - no scungy sandwiches for this lot! We had delicate club sandwiches for morning tea, a lavish luncheon of variety meats and salads, and delectable cakes for afternoon tea. One of the greatest rewards for the day for me was to overhear comments like ‘the food is fantastic!’, ‘we’ve never been treated like this before’, and ‘this is terrific’. The atmosphere at lunch and tea breaks was one of excitement, with lots of talk and laughter.

We made the conference very participative too. They heard from nursing leaders in the morning, and we held a workshop in the afternoon for them to identify issues that were important to them. The lovely thing about the ENs is that they were ready to rock ‘n’ roll from the word go. There was no trouble getting them to participate. Also it was the first time any number of them from different workplaces actually got

together to talk exclusively about themselves - and they certainly warmed to the occasion!

It was my job to close the conference (I had convened it and done most of the organising). The last two sessions of the day were one on assertiveness, and then a summing up of the major issues they'd identified as of concern for them. In closing the conference, I decided to be a little unconventional, and shouted:

ME: 'HAVE YOU LEARNED SOMETHING TODAY?'

CROWD: 'YEESS!!'

ME: 'HAVE YOU BEEN ENTERTAINED?'

CROWD: 'YEESS!!'

ME: 'HAVE YOU HAD FUN?'

CROWD: 'YEESS!!'

ME: '**ARE YOU READY TO TAKE ACTION?**'

CROWD: **YEEEESSSS!!!**

It was overwhelming and exciting. I left feeling exhilarated myself. The feedback since the conference, from ENs as I have met them around the traps, has been extremely positive. They report that they had the best time they've ever had at that conference. Just that has made it all the more worthwhile to me."

The day ended with a tremendous response to Shepherd's call for action, and with Thompson's ideas and practice in mind we can see why:

The conference linked gender and class. The issue of gender was stamped on the day by having two statues of women in the foyer. All the participants were women and all the speakers were women. The issue of class was perhaps not so overtly stated but was nonetheless there in the analysis of the positions enrolled nurses held within the health industry hierarchy. Clearly Shepherd set out to encourage participants to question that position and to restate their worth in terms of the work

they did, the responsibilities they carried, and the way others in the system relied on them.

The conference focussed on identity. By bringing often isolated workers together and giving them an opportunity to talk about themselves Shepherd was enabling them to affirm their identities as women, as enrolled nurses and as unionists.

The venue and catering underlined the messages about identity and worth but may also have raised one or two questions in participants' minds. After all, why had they never been treated like this before? Why should this kind of treatment be considered 'normal' for some sectors of the health service, but unusual for them?

And by organising a closed and exclusive event, Shepherd created a situation in which the participants felt not only secure but able to talk, to express themselves, to ask questions, to inquire. In the company of people with common experiences, they were ready to rock 'n' roll from the word go.

But I have used Thompson's ideas and practice to analyse the conference after the event. The challenge would be to follow up the conference with further training constructed around Thompson's ideas of gender, class, the affirmation of individual and group identities, the examination of inequities and injustice, the release and channeling of anger, and the planning and implementation of action. This could not be done in a single event. We would need a program of exclusive seminars, study groups and writing workshops in which enrolled nurses were encouraged to reclaim and create knowledge about themselves, the health industry and their union. This in turn would require time, money and dedicated training staff. But if Thompson's own experience is anything to go by, the result would be a number of activists with the kind of commitment, skills and authentic knowledge that can make unions stronger and more effective in their workplaces, in their industries and in the broader industrial relations arena.

Part Seven: Purpose

Chapter 34: The Third Contract

When the crowd of enrolled nurses shouted that they were ready to take action, what kind of action did they have in mind? Was it action within the limits of mainstream industrial relations - the kind of action that is usually regulated and brought to a conclusion by an industrial commission? Or were they saying they were ready to step outside the normal modes of behaviour and take their action wherever it led? Using Thompson's terminology, were they ready to be rebellious?

Commentators on trade unions in Australia have identified two broad ideological orientations - one described as radicalism, the other as labourism (Frenkel and Coolican, 1984; Morris, 1991).

Radicalism is the idealistic, essentially revolutionary, orientation. It is the term used to denote that grouping of beliefs espoused by union officials and activists who argue that capitalism should be replaced by a fundamentally different social system. These officials and activists may differ in their views as to the exact nature of the new social system they would like to see in place, but all belong to the left of the political spectrum.

Labourism, on the other hand, denotes a gradualist, politically centrist, and pragmatic orientation. It is based on the assumption that a strong labour movement will gradually improve the conditions of workers, and therefore society, through negotiation with employers and employer bodies, through the good offices of the Labor Party and fair-minded Labor Governments, and through legal and statutory machinery such as the Industrial Relations Commission.

Morris argues that labourism 'is the set of beliefs with which most current union leaders and activists readily identify' (1991, p.137). If we look at the last ten years of industrial relations in Australia, which have been marked by the Accord, the establishment of a swag of tri-partite bodies at national level, and regular consultation between ACTU officials and federal Labour Government ministers, then we will have to accept that Morris is right. And since the ACTU has in effect controlled TUTA policy, and most other unions have taken the lead in their training from TUTA, we will also have to accept that it is this gradualist, politically centrist and pragmatic 'ideology' which has informed most Australian union training.

A problem

For union trainers wanting to draw on the community development tradition of adult education the labourism of Australian unions and union training presents a problem since the major figures in the community development tradition are radicals.

Tomkins and Coady may have been located within an institution unsympathetic to the communism of the day but their work had affinities with the radical traditions of the working-class cooperative movements of the nineteenth century and so challenged mainstream, capitalist thinking about the control of production and the distribution of produce. Freire sees his ideas in the service of people's revolutions against the right in latin-America, and in the service of third world countries in their struggles against cultural, political and economic domination by the first world. Horton argued for a different kind of democracy that would place genuine decision-making in the hands of working people. And Thompson calls for fundamental changes in the way power is distributed between individuals, between genders and between social classes.

If union trainers draw on the ideas and practice of these kinds of adult educator to any large degree, we are likely to come into ideological conflict with the unions we are working for. Of course we could avoid the problem by simply plundering the tradition for effective techniques, but ultimately that will lead us into a kind of training that is shallow and unproductive. We would end up, to borrow Allman's arguments (1987, pp.220-223), simply facilitating the exchange of ideas and information already known rather than encouraging critical enquiry and the creation of knowledge.

The alternative is to take up the challenge, and to use the ideas and examples of these radical adult educators in order to help us review our work and develop new, better and, yes, more radical training. Doing this will not be easy, but we may understand better how to go about it by looking again at those 'contracts' the trainer, the union and the participants enter into.

Organisation

The first contract - that between the union and the trainer - will exist within an ideological framework of labourism. At times we may see our union as an ideal, or the sum of its members, but in this manifestation the union is a structured and legally registered organisation. It will be operating within the industrial relations system, normally subjecting itself to the rulings of the industrial arbitration process, and in all

likelihood will be affiliated to the ACTU. The trainer will be employed or appointed by the union, and subject to its controls through its policies and its executive. The union will set the objectives for its training program and these are likely to be organisational ones to do with equipping members and officials with the necessary skills and knowledge to make the union function more effectively. Other objectives will be related to promoting the union's and, quite possibly, the ACTU's policies.

In the second contract - that between the trainer and the participants - labourism will still be the dominant ideology in terms of course and session objectives. Although these may have been written by the trainer, they will be subject to scrutiny by the union executive and will need to be in accord with the union's policies and the overall objectives the union has set for the training program as a whole.

The sum of the members

However in the course of the training, that is, in the encounter between the trainer and the participants in the training room, a shift might occur from a labourist framework to a radical one. This comes about because the trainer encounters the union in another manifestation - the union as a sum of its members. These members may want to debate the objectives of the course, and the trainer may have to respond by altering the training in some way. Indeed, within the training room, the trainer has it within her or his power to respond to some of the participants' demands, to make choices, and to use methods in ways that are informed by a more radical framework of beliefs and ideas. For example, the trainer may shift from a conventional mode of questioning to a form of intervention informed by the reading of, say, Heron, and then to dialogue of a Freiran kind. In the first case, the questioning is aimed at helping the transfer and understanding of information. In the second, the interventions are aimed at helping the participants understand themselves and their own reactions better. And in the third, the dialogue is aimed at increasing the participants' critical consciousness.

In the process of shifting to a kind of practice that is informed by more radical theory, the trainer is in fact addressing the third contract. The third contract is the most important in the training process. It involves a two-way relationship between the union as represented by the participants and the union as an organisation, and this relationship is mediated by the ideals of unionism.

The union as an ideal

The trainer is not party to this contract, but can influence it. To ensure that the third contract is a strong one, the ideals that mediate it must be continually reinforced. To ensure that the union we work for does not become an autocratic organisation, similar in structure and behaviour to the corporations and businesses it must deal with, we need to reinforce the ideal of democracy. We need to ensure that the saying 'The members are the union' remains a reality. We need to ensure that the members know that the union is theirs, that the officials are their servants, and that the structure they are a part of has been constructed to serve their interests as workers and members. And we need to ensure that they have the necessary skills and the motivation to act on that knowledge.

Irrespective of the objectives of a particular training course, these ideals of democracy should be demonstrated in the way the course is conducted, in the choice of methods, in the nature of the exercises written and conducted, in the use of discussion and dialogue, and in the content.

Democracy

Unions that practise democracy are essential to our political and social wellbeing in Australia if we are to avoid conforming to the bleak picture painted by the American social commentator, Noam Chomsky:

The political and social history of Western democracies records all sorts of efforts to ensure that the formal mechanisms are little more than the wheels spinning idly. The goal is to eliminate public meddling in policy formulation. That has been largely achieved in the United States, where there is little in the way of political organisations, functioning unions, media independent of the corporate oligopoly, or other popular structures that might offer people the means to gain information, clarify and develop their ideas, put them forth in the political arena, and work to realise them (1992, p.76).

But what kind of democracy should we promote? Horton used the phrase 'economic democracy'. Clearly this concept was a powerful and guiding one in his thinking and practice. And yet he never formulated a clear definition:

To have democracy, you must have a society in which decision making is real, and that means replacing, transforming and rebuilding society so as to allow for people to make

decisions that affect their lives. These decisions shouldn't be counteracted by an economic structure in which maximising profits overrides all other values. It's a growing concept that has to do with moving in a certain direction. All you can talk about is the direction and some of the elements you want to see built into the kind of society that you don't have now but would like in the future. But as you move toward it, you may notice lots of weaknesses and limitations in your concepts, so you change them. This is why I've never been able to define democracy. Somebody once said of me that I purposely refuse to state what I mean by democracy. As if it were a secret. It's just that for me it's a growing idea (Horton, Kohl and Kohl, 1990, p.174).

Rather than trying to tie the concept of democracy down, we should, like Horton, be in continual and creative search for an idea that will forever be growing and changing. We should start the search with our own and our participants' experiences of democracy, helping them recognise, analyse and give those experiences meaning. We should understand that the search will take place within a context of social and workplace change. We should expect to encounter contradictions, between shopfloor democracy and the formal structured democracy of the union, between 'economic' and 'civic' democracies, between 'participatory' and 'electoral' democracies, between 'voluntary' and 'coercive' democracies, between 'continuous' and 'occasional' democracies. And we should welcome the identification of contradictions as the product of critical reflection, as a rich source for further learning, and as a spur to action.

The third contract is essential to the continued success of a union. If the interaction between a union as a sum of its members and a union as an organisation is vigorously and continuously democratic, then that union will be able to resist domestication by employers, governments and its own peak bodies and, when necessary, will be able to engage in radical action. Defining, redefining, establishing and continually re-establishing this third contract must be the overriding purpose of all our training.

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