

# Trade union education

## *key challenges*

**T**rade union education in South Africa has made a major contribution to the growth and development of the South African trade union movement.

The most important providers of trade union education have been the unions and federations themselves, supported by labour service organisations, worker colleges and in the past four years by Ditsela.

Trade union education encompasses 'formal' training programmes and workshops, as well as the range of informal, on-the-job and other forms of experiential learning that takes place in a union environment.

Trade union education's primary aim is to build a strong trade union movement. It has a tradition of collective, participatory and active learning, embedded in union values and principles. It has focused on ensuring that unionists in their various roles are effective in delivering on their purpose and mandate.

### **Change**

In the changing political and economic climate nationally and internationally, trade union education cannot escape the pressures facing the union movement as a whole.<sup>4</sup>

Although the greater part of the movement generally maintains a socialist vision, the political discourse in the

*At the end of its fourth year, Ditsela looks at some of the challenges facing trade union education in South Africa, and explores ideas for meeting the challenges. Chris Bonner reports.*

environment has shifted radically. The language, ideology and practices of the 'market' have entered trade unions in both overt and subtle ways.

Changes in the global and national economic terrain mean that unionists are struggling to adapt to a situation of greater complexity. They have an ever-increasing need for more in-depth knowledge and skills, as well as creative strategies and approaches that can balance national imperatives with immediate worker interests.

With changes of such magnitude, it is not surprising that union culture and unionists themselves are changing. This includes a changing understanding of the purpose and functioning of unions, and changing attitudes and practices. It includes the more rapid turnover of union staff, linked to the opening up of career opportunities and a generally more individual orientation.

## Challenges

These broad changes affecting, and being affected by, the trade union movement, present challenges for trade union education. These challenges include what type, level and form of provision there should be, and how it would be sustained. It includes deciding who the providers are and what contents should be covered. Learners' and their unions' attitudes and expectations towards education would also have to be dealt with. They begin to question the purpose and value of union education, including the principles, values and collective ethos on which it has traditionally been based.

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Trade union education that encourages critical, creative thinking and questioning helps build people's capacity to deal with these challenges. Yet this may itself pose its own challenges to the movement.

Whilst many fear the challenges will have negative consequences, they force those of us involved in union education to constantly reflect on purpose and practice, and to come up with innovative ideas and activities.

## Challenge of sustainability

Over the past four years, Ditsela has had a significant impact on the level of provision and quality of trade union education. It has helped to shore up a generally shrinking

resource base. This is due largely to substantial core funding provided by the Department of Labour. However, within unions and federations provision is patchy and often funding (and funder) driven. Whilst a union or federation in one year may provide extensive programmes, the opposite may be true in the next year should a funded project end. Similarly, with a limited number of skilled union educators – and with high turnover – the loss of a central figure in a union/ federation can dramatically affect the ability to run programmes. In a 1998 survey by Ditsela, both unions and labour service organisations cited lack of funds as a major inhibiting factor in sustainable and quality provision.

Where funds are available, there is an increasing trend for unions to 'contract' out their education and training to commercial providers, consultants and higher education institutions. They sometimes condone provision by management of key programmes such as basic shop steward training. This results from the shortage of union educators, the shrinking of traditional labour service organisations, the consultancy culture invading society and the increasing value placed on formal institutions, certificates, glossy presentations and the like.

Whilst an adequate supply of 'strings-free' funding, with non bureaucratic procedures for access and reporting, appropriate to the union environment would enhance development and sustainability, major challenges would remain.

In the confusing and complex political and economic environment, it is crucial to clarify a common co-ordinated vision and purpose for trade union education, and for leadership to reaffirm its value.

Coupled with this is the need to attract, quickly build the capacity of, and then retain, a cadre of skilled and committed



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trade union educators – within and close to the union movement. Ditsela has this as one of its most important tasks. It is also experimenting with new strategies to support educators in their work. However, despite these efforts, the numbers and skill levels required to make a significant and sustainable impact remain a major challenge.

### **To formalise or not?**

'The legacy of apartheid education has left several generations of black workers with little or no access to education and training, or qualifications of any marketable value. Workers are now turning to their own organisations to address these needs? [There are] heightened demands for access to training, certificates and career paths.'

The legitimate concern for redress through qualifications, together with rising career and salary expectations, and the promise contained in the new skills and

education legislation, pose enormous challenges for trade union education. Unionists are requesting that the trade union courses be formally accredited. This has raised a number of concerns and debates within the movement.

Some of the concerns are political and ideological. Others are practical and resource-based. For example, concern has been expressed that formalising and accrediting trade union education will undermine its very purpose – to build strong unions – as well as change its collective and transformative agenda. Individual trade unionists will use scarce resources to build their own careers (often out of the movement), and the democratic process will be undermined. Unions and management will begin to demand only formally qualified officials and shopstewards, and those whose formal education is limited will exclude themselves from training for fear of failure.

Practically, it has become clear that

developing qualifications, the necessary systems for assessment and record-keeping, as well as suitably qualified unionist educators to do the work within and close to the unions, requires massive initial and ongoing resources. The alternative seems to be to hand over trade union education to outside providers, whose motives, commitment and ideological orientation may be very

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different from that of the trade union movement.

There are, however, compelling arguments that have led Ditsela, with the federations, to take a decision to move cautiously towards accrediting some of its courses, particularly the courses in the Ditsela Advanced Series which involve 20 days contact time, arranged in four blocks. This will include working with the Education, Training and Development Practitioners (SETA) covering trade union staff. It will include developing more formal certification processes with its current university partners as well as increasing the pace of development work on a home-grown trade unionist qualification linked to the national qualifications framework (NQF).

This decision recognises that such a move may contribute to the securing of

sustainable funding, providing for career development in the unions and thus motivating and retaining staff, as well as forcing an improvement in the quality of union education. A recent study carried out by the British Trades Union Council (TUC) on its accredited shop steward training programmes, showed that fears of negative outcomes were unfounded. However, caution should be exercised in making assumptions from international comparisons. In this example, the material and human resources available are in an altogether different league.

### **Changing context**

With the changing union context, comes a need for new content, new skills and new approaches to union education. In a recent Ditsela study on the roles and competencies of union organisers, we found that although traditional activities were still important in organiser jobs, the approach to these was changing. In addition, they had to deal with a range of complex issues, which they felt ill equipped to handle. These ranged from applying new laws effectively, to negotiating on economic policy, industrial restructuring and workplace change. They included issues as diverse as counselling workers on HIV/AIDS, and advising workers on financial problems and the setting up of small businesses.

This need for new knowledge, skills, approaches, and strategies is to be found at all levels in the unions. There is a perceived need for more in-depth and specialist training programmes for specific roles and functions – for example, legal specialisation, specialisation in health and safety or retirement funds, and for union leadership to acquire skills to manage unions effectively. Training in the use of technology and in communication skills is high on the agenda. Women leadership



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development and gender awareness programmes have become important. At the same time, there is a recognition that political education must be stepped up to counter the negative and pervasive effects of neo-liberalism, globalisation and technicism.

The challenges facing union educators and institutions like Ditsela, with this changing agenda are enormous. There has to be constant development based on experimentation, as well as the creative use of international and local experience. In this climate, it is not surprising that unions seek outside assistance from consultancies and higher education institutions to plug perceived gaps in our own education, educators and institutions.

It is clearly important that we find a way to make maximum use of scarce resources and expertise through building local networks of 'union-friendly' providers, developing appropriate

partnerships, and linking with trade union educators in other countries.

### **Methods and approaches**

Linked to the challenges around content, are challenges around methodology and broad approach. For example, in the area of economics, there is an ongoing debate around the most appropriate teaching and learning methodologies. Should we use an approach that is primarily experiential, or do we focus on giving new knowledge directly. Or is it something in between? How far should we be using new technology in our education programmes? Is it appropriate to focus resources on developing and using technology, including developing distance education by computer – as is increasingly happening in the north? Or should we focus on simple, understandable and basic methodologies which grassroots educators can easily apply?

On a broader level, there is a question

as to whether trade union education, with its focus on courses and workshops, is capable of effectively achieving its challenging objectives.

Trade union education depends to a large extent on the capacity of unions to take advantage of available funding to run programmes or to take advantage of programmes offered. Often the better resourced and organised unions are the ones who do so, and the unions who most need assistance do not.

A look at the Ditsela records or the funds allocated but not expended in the South African Labour Development Trust – a funding organisation set up to disburse European Union money confirms this observation.

It has been noted on numerous occasions that education and training courses alone are not enough. The concept of collective learning for organisation-building implies that the individual learner must apply skills and knowledge acquired on return to the union. However, learners often report that they are not able to do so due to lack of support or opportunity. Interestingly, despite this many are able to make their contribution in a number of ways that perhaps we had not thought of. Our current research on the impact of the Ditsela Administrator Development Programme, 1999 is revealing in this regard.

Ditsela is taking up the challenge and is experimenting with participant follow up, support for education development, women leadership support, as well as requests for advice and assistance on a range of organisational change and development issues. This work, however, is dependent on skilled and experienced staff members, flexibility in funding and an ability to deal with frustration and unpredictability.

## The global challenge

Globalisation and the increasing power of multi-national companies, international financial institutions and financial speculation requires a global response from labour. In South Africa, solidarity with African countries is recognised by the federations as vital. Trade union education has an important role to play in the process of building solidarity. One way is the sharing of ideas on methodology, another is by building links and common programmes through new technology. An example of this is the International Study Circle Project of the International Federation of Worker Education Associations (IFWEA). In Africa provision of direct support becomes important.

The latter is a particular challenge for South African federations and institutions as our own lack of capacity becomes even more stretched. Ditsela is taking up these challenges in a measured way through encouraging participation on our courses, and providing for extended visits by key African educators.

## Crossroads?

Whilst some of the challenges seem daunting in an environment of shrinking financial and people resources, trade union education continues to be a vital and integral part of trade union life. It is an exciting and rewarding field in which to work.

Both COSATU and FEDUSA have recently reaffirmed its importance in strengthening the movement. However, its role and future direction is uncertain given the changes and challenges facing unions, and the particular challenges facing trade union education. ★

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