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Employment Relations Education: Learning for a Change?

**A thesis presented in partial fulfilment of the
requirements for the degree of Master of Education
(Adult Education) at Massey University**

Ross Teppett

2008

Dedicated to the memory of

Ada Joyce Marsden

6 September 1915 – 23 November 2008

“My life is so much better because of the EREL training and being a union delegate. It is amazing how much confidence you get and how that can change your life and the lives of your family.”

*Polly
Research Cohort Participant*

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ABSTRACT

Trade union education constitutes a significant practice within the adult and community education sector in New Zealand, but rarely is the subject of academic research. This study examines one major domain of trade union education in this country, Employment Relations Education (ERE). Working collaboratively with a small group of member-activists from a large private sector trade union, the study investigates the evidence of transformational changes that may emerge as a result of their participation in ERE courses and workshops. An appropriate definition of transformation is used for a trade union context. This refers to that change occurring at the micro and macro levels of union activity that in turn leads to the twin goals of wage and social justice through the building of union influence and power – at the workplace and community levels. The study examines the nature and role of union education within the broader trade union context, particularly the ERE provisions of Employment Relations Act 2000 (ERA), enacted in response to a decade of significant labour market deregulation and marginalisation of unions under the auspices of the Employment Contracts Act (ECA). The study is located within the critical paradigm of qualitative social research, using a range of collaborative methods such as focused conversation, personal journals and photography, and, as such becomes a critical learning journey in itself for some participants. The study concludes by affirming that ERE plays an important role in augmenting the learning and development of member-activists in their daily struggle to improve the working lives and social outcomes for members through collective agency.

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My sincere thanks go to my workmates and comrades at the Engineering, Printing and Manufacturing Union who have been fully supportive of me from the beginning of this endeavour. My union has given me the time, space, encouragement and resources to help me with my studies and complete this work. Thank you to the Service and Food Workers' Union's John Ryall and Jody Anderson for enthusiastically facilitating this research project from the beginning, and for their participation in the study. I sincerely acknowledge the contribution made to this project by the six Service and Food Workers' Union member-activists central to this study who participated so willingly and energetically – giving up their precious time, and at personal cost, to be involved in this work. This is a collaborative work. This is also your work. I also acknowledge the keen support and skilled guidance of my supervisors for this study, Dr Marg Gilling (Massey University) and Dr Mike Law (University of Waikato).

I acknowledge there will be personal gain with this Masters thesis; the recognition that can go with such credentialism; the great joy and satisfaction of having traversed a long and enlightening journey of personal learning. However, most importantly, I want this study to be useful and insightful to those who have so freely offered their time, collaboration and commitment to participate in its production, and to the many union activists throughout New Zealand who may be able to enhance their own learning and understanding by studying and critiquing this work.

GLOSSARY

DOL	Department of Labour
ECA	Employment Contracts Act
EPMU	Engineering, Printing and Manufacturing Union
ERA	Employment Relations Act 2000
ERE	Employment Relations Education
EREL	Employment Relations Education Leave
ILO	International Labour Organisation
MECA	Multi-Employer Collective Agreement
PEL	Paid Education Leave
NZCTU	New Zealand Council of Trade Unions
SFWU	Service & Food Workers Union – Nga Ringa Tota
TUEA	Trade Union Education Authority
TUTB	Trade Union Training Board
UREL	Union Representatives Education Leave Act

"The labor movement was the principal force that transformed misery and despair into hope and progress. Out of its bold struggles, economic and social reform gave birth to unemployment insurance, old-age pensions, government relief for the destitute and, above all, new wage levels that meant not mere survival but a tolerable life. The captains of industry did not lead this transformation; they resisted it until they were overcome. When in the thirties the wave of union organization crested over the nation, it carried to secure shores not only itself but the whole society."

Martin Luther King Jr.

Speech to the state convention of the Illinois

AFL-CIO,

October 7, 1965

CHAPTER 1:

INTRODUCTION - Employment Relations Education: Learning for a Change?

A New Zealand Trade Union Education Case Study

This is a study that looks at trade union education in New Zealand, with a focus in particular one facet, the statutory entitlement to paid leave for union members called Employment Relations Education Leave (EREL). Union education is a significant field of practice in the adult and community education sectors in New Zealand and internationally. However, there is a paucity of academic research on the subject (Martin, 1994; Ball, 2003; Croucher, 2004). This study involves a search for evidence of transformational impacts of Employment Relations Education (ERE) workshops and courses, working in collaboration with a small group of Wellington-based member-activists from a large private sector union who have participated in ERE programmes. This study collaborates in solidarity with those who are the subjects of this study, in an attempt to do 'research with' – rather than the more positivist and traditional orientation of 'research on'. This project takes the stance that research is never neutral, that it is always political.

The study uses a definition of 'transformation' for a trade union context. This can start at the micro level in the democratic union classroom, with a collective learning process that can facilitate the developing of new, deep and critical understandings of current knowledge systems and structures. These new understandings can set in train a series of events or actions outside the classroom that in turn can lead to macro manifestations of transformation in terms of fundamental change at the personal, work and societal levels. For unions, transformation is defined as that form of progressive change that can be achieved through learning and action that

contributes to building workers' power and influence to achieve fairness and justice – at workplace level through to the broader community context.

Every year in New Zealand many thousands of workers who belong to unions take part in some form of union education. The largest beneficiaries of formal union education programmes are delegates, or as they may also be called, shop stewards¹, convenors, activists or union reps. These are workers who have been elected by their fellow union members to be their representatives – to uphold, assert and promote the interests of members on the job and in other union arenas. They will come from the extensive range of occupations that can be found across New Zealand workplaces. They may be cleaners, bus drivers, teachers, rest home workers, nurses, engineers, printers, electricians, doctors, posties or from any other of the hundreds of occupations that are covered by the 350,000-plus New Zealanders who belong to registered unions affiliated to the NZ Council of Trade Unions (NZCTU).² Within the union community, in New Zealand and internationally, there can be found a rich and diverse range of learning taking place every day – both in the sense of formal and informal learning. This will be on the job, in the union classroom, in the homes of workers and in community life. This grounded notion of learning is expressed by the Canadian Auto Workers: “Working people learn from their everyday experiences, from their struggles for dignity and equality, and from their democratic participation in the life of the union at all levels” (Livingstone and Raykov, 2005, p60).

Trade union education - Three learning drivers

In formal union education workshops, like those where ERE is being used, union members will usually be exposed to a broad union learning agenda underpinned by three essential learning drivers:

¹ Traditionally, the 'shop steward' or 'steward' is regarded as being the senior delegate in a workplace.

² The New Zealand Council of Trade Unions (NZCTU) is the peak body of the New Zealand union movement, with 40 affiliate unions covering 350,000 members (Source: NZCTU website - www.union.org.nz). According to figures from Victoria University of Wellington's Industrial Relations Centre, 92.3% of union members in 2006 belonged to unions affiliated to the NZCTU (Source: NZCTU acting secretary, Peter Conway, in email to author 5 November 2008).

- 1) Building knowledge and skills
- 2) Understanding issues
- 3) Developing critical consciousness

Learning agendas will vary between unions, reflecting the history, politics, philosophy, values, strategic direction and membership demographics of the particular organisation. These three drivers are not mutually exclusive and all three may be present in a dynamic inter-play in the same union education workshop.

The first driver deals with building members' knowledge and skill development. This is a practical approach to learning the skills required for the job of a workplace union representative, member activist or leader. Learning will cover core subject areas such as generic communication skills, understanding industrial legislation and workers' rights, how to handle grievances and disputes, knowing what role the representative plays in the collective bargaining process and how to recruit new members to their union.

The second driver concerns deepening understanding of the broad range of issues confronting workers on their jobs that impact on the quality of working life. For example, this can be learning about the root causes of how harassment and discrimination occur and how they can be dealt with, or it could be about growing awareness of the relationship between workplace productivity, industry development and employment sustainability.

The third driver is about developing critical consciousness in relation to how workers see and respond to their world. This concerns how they develop new, insightful and critical understandings and how they can work to progress, generally in a collective context, the ideas, strategies and approaches that will have the potential to transform or change their world for the better. This is about union activists participating in the broader struggle to achieve wage justice on the job and

social justice in the community. It is about saying unions stand for progressive change. They do not act as agents for the defence of the status quo.

Most union education takes place through participation in formal, structured courses organised by their union or through the country's central union body, the New Zealand Council of Trade Unions (NZCTU), with union educators generally facilitating programmes. In most situations these will be courses run under the umbrella of Employment Relations Education Leave (EREL)³. A union member will also learn much in informal settings – such as the workplace lunchroom, meeting hall or picket line outside the factory gates. In these informal, extra-classroom contexts, union organisers and workplace delegates and other leaders can be found to also be doing the 'teaching'.

Employment Relations Education Leave (EREL)

For workers who belong to unions the most significant access to union education since 2000 has been through attending workshops that have been approved for the use of the statutory paid leave entitlement, EREL. This leave is allocated annually by unions on a company by company basis, in line with a formula prescribed by Part 7 of the ERA. Any union member can use EREL through their union, but the most significant user groups are delegates, the on-the-job member-activists that have been elected by their fellow members to be job-site representatives. The Employment Relations Education Ministerial Advisory Committee (2008), the statutory body charged with advising the Minister of Labour on the administration of Part 7 of the ERA, reported in 2007 that a total of 14,254 days of EREL were used. Over 95,000 days have been utilised by workers in the six year period 2002 – 2007. In my own union, the Engineering, Printing and Manufacturing Union (EPMU), an average of nearly 2,900 days of EREL were used annually in each of the years 2006 and 2007 – making up more than 95 percent of all member

³ See Part 7 of the Employment Relations Act 2000. The entitlement for unions to allocate EREL, and for members to use it, came into force in 2000 following the election of a Labour-led government in 1999.

education in those years. However, these EREL days represented only about 40% of the overall number of EREL days allocated annually by the EPMU.⁴

The aims and objectives of this thesis

This thesis aims to take a critical look at what impacts ERE courses and workshops have on the working and union lives of a small group of Wellington based member-activists from a large private sector union, the Service and Food Workers' Union – Nga Ringa Tota (SFWU). Specifically, I look for evidence of any transformational impacts of ERE, as these may manifest at the personal level as well as the collective and/or union levels. The central question of this study asks, 'ERE: Learning for a change?' This question points to the search for evidence of ERE contributing to generating the type of change, or transformation, that leads to progressive and demonstrable improvements for workers in relation to what happens on their jobs, in their industries, in the broader community context or in all these spheres.

For the last eight years ERE has been an important part of the union education landscape in New Zealand. As a union educator, and committed union activist (see Appendix 10), it is important to seek to learn about what is happening in this critically important field of union activity. It is important to know whether ERE is enhancing union effectiveness in terms of making a positive contribution to the advancement of workers' interests and the union movement's overall aims and objectives for working people.

⁴ Source: Education Report to the EPMU Biennial Conference, July 2008. The EPMU member education programme is highly focused on workplace delegates. The relatively high percentage of unused EREL reflects the fact the EPMU organises across more than 2,000 workplaces. Among these there are a very large proportion of under-5 member workplaces that, while they receive a small annual EREL allocation, they will rarely use it due to there being no delegate or other representatives.

The structure of this thesis

Chapter 2 – DEVELOPMENT OF TRADE UNION EDUCATION IN NEW ZEALAND

The development of trade union education in New Zealand is covered in depth in this chapter. In the late nineteenth century the State began to play a significant role in worker education, reflecting the development of an economic model referred to as welfare-capitalism. This model accepts the role of private ownership and the capitalist means of wealth production, together with a legal function for unions in centralised wage fixing and industrial and social affairs. Towards the end of the twentieth century the welfare-capitalist model began to seriously fray, with a neo-liberal, market-driven, economic agenda in the ascendancy. In 1986 the fourth Labour government legislated for paid education leave for union members and created the Trade Union Education Authority (TUEA). While there are glimpses of TUEA's democratising potential, the life of the Authority was cut short by the National government's desire to see the marginalisation of unions, in the name of labour market efficiency, by enacting the Employment Contracts Act (ECA) in 1991 as well as other related legislation. In the 1990s unions began to look outwards for new approaches to the way they organised to combat the hostile industrial environment fostered by the ECA. The widespread adoption by unions of the 'organising method' saw union education playing a key role once again in union affairs. With the election of a Labour-led government at the end of the century there is a return to industrial laws giving legal recognition to registered unions and reinstating a social partnership role. The ERA heralds a new form of paid education leave for union members in the form of EREL.

Chapter 3 – LITERATURE REVIEW

This chapter looks to deconstruct the question at the core of this study, 'Employment Relations Education: Learning for a change?', and seeks to find in the literature what can be understood by transformation in a trade union education context. There is a look at the nature and influence of a union's ideological

orientation on its education philosophy and practice. The aims of trade union education are explored – particularly in what the literature says about the potential for developing a critical learning agenda for workers so they are able to understand and act on their world to democratise and improve it. Informal learning in the workplace and its links to union education are investigated, as is the influence and status of class in workers' learning. The chapter concludes by looking at some limited research that has been conducted into an ERE course facilitated by the NZ Council of Trade Unions (NZCTU).

Chapter 4 – DESIGN OF STUDY - METHODOLOGY

This chapter deals with the design of the study and begins with establishing the project's methodological orientation. I outline how my methodological threads are woven throughout the study like a fabric's warp and weft. I examine where this study sits in relation to the normative, interpretative and critical paradigms of social research. It is argued that it is in the critical orientation, with strong echoes of feminist critical influence, where this work most comfortably sits. For this is a study that recognises there are great many imbalances of power in our society causing injustice and marginalisation, particularly in the world of work. This leads to outlining my desire to give voice to the participants with whom I collaborate in this project. I acknowledge it is often the marginalised, bringing to the table varying degrees of cultural capital, who find it most difficult to articulate themselves or be heard. I elaborate on the key research method of focused conversation that is used in my work with the SFWU research cohort. I explain how this highly collaborative method fits well with my methodological approach. The chapter finishes with an outline of how I set out to triangulate the data gathering, for reasons of robustness and validity, through the use of supplementary one-on-one interviews with the leader of the SFWU and the Union's Wellington-based education organiser, as well as using rich personal narratives and contributions from the research cohort members in the form of their journals and photography.

Chapter 5 – GETTING STARTED: IMPLEMENTATION OF THE RESEARCH

The process of initiating this study with key SFWU officials is covered in this chapter, through to the establishment of a research cohort made up of six member-activists from the Union that would be central to this study. The SFWU national secretary was an enthusiastic supporter of this study from its inception, seeing it as beneficial to understanding more about the effectiveness of the SFWU's ERE programmes. The Union's part-time education organiser played a key role in initially identifying and contacting the member-activists who would go on to make up the research cohort. This chapter also provides details of the 'Low Risk' ethics approval process that was associated with this study, based on maintaining the anonymity of the research cohort members. The chapter ends with profiles of the six members of the research cohort, revealing a broad range of experiences in terms of their union activism and education, family and community activities.

Chapter 6 – THE RESEARCH MEETINGS AND DATA GATHERING

Outlined in this chapter are the key research activities undertaken with this study - comprising the four research meetings with the SFWU research cohort, the interviews with two SFWU officials – the Union's national secretary and education organiser, along with the distribution of journals and cameras to the cohort to record their experiences as union activists and reflections on being involved with the study. The tentative beginnings of the study are traced from the first research meeting, as well as the opportunities to further build the bonds of solidarity and trust between the researcher and the SFWU member-activists. Included are the results of a creative 'visioning' session conducted with the research cohort using 'butcher's sheets', with the role of ERE being linked to the member-activists' vision for the future. Another creative exercise that is outlined in detail, reproduced from a butcher's sheet, involves the cohort designing a poster for presentation at a government-sponsored conference looking at evaluating workplace learning.

Chapter 7 – RESULTS FROM THE STUDY

The detailed results from the major sources of data gathered in the course of this study are presented in three sections in this chapter. The first section covers the broad themes that emerged from the four research meetings involving the cohort held between the beginning of November 2007 and the end of February 2008. These themes have been distilled from the transcripts and butcher's sheet exercises. The second section presents the member-activists' verbatim journals and photographs – recording their rich narratives as union activists and reflections on participating in the research study. The last section is an analysis of the interview with the SFWU officials on the role of ERE and union education in their Union. A wide range of powerful and dynamic insights emerge into the way the cohort perceive and view their world, as well as the impacts and influence that ERE has had on the way they act in their world. We see that the cohort members work hard to build unity and solidarity with other unionists, along with evidence that their activism is carried through to their communities where some play influential leadership roles.

Chapter 8 – CONCLUSION

This concluding chapter affirms that there is strong evidence ERE has had a significant impact, in terms of transformational changes, on the member-activists who make up the research cohort in this study. As well, their Union has benefited greatly from ERE, particularly in relation to building activist consciousness and augmenting the SFWU's industrial and political campaigning effectiveness. The potential for transformation is related to three major inter-related themes: Firstly, having a statutory entitlement to paid education leave (EREL). Secondly, the strategic use of EREL by the SFWU. And thirdly, the critical learning opportunities that can take place in the democratic union classroom that can lead to progressive change occurring on the job, in an industry or in the community.

Chapter 2

TRADE UNION EDUCATION – A NEW PERSPECTIVE

“Union education has always been at the core of union action.”

International Labour Organisation (ILO), 2007, p1

Introduction

This chapter starts with a brief description of the tenets of trade union education. It goes on to trace the development and practice of trade union education in New Zealand, starting with its embryonic beginnings in the late nineteenth century in the form of state-sponsored initiatives around worker education and training. Worker education is inextricably linked to the development of what is referred to as welfare capitalism – a pluralist economic model that promotes private ownership and enterprise, state-sponsored social welfare and an active role for trade unions in industrial and social affairs. This robust tripartite model endured through to the 1970s and 1980s when there were moves by successive Labour governments to specifically stimulate and promote trade union education through the creation of dedicated statutory entities in the form of the Trade Union Training Board (TUTB) and Trade Union Education Authority (TUEA) respectively. However, the neo-liberal economic orientation of the fourth Labour government produced significant challenges for the maintenance of the century-old welfare capitalist model, undermining the role and place of the labour movement as an industrial and social partner on the national stage. The bold and progressive objectives that underpinned TUEA were looking increasingly unlikely to be realised towards the end of the 1980s. An incoming National government in 1990 offered unions no respite from the neo-liberal onslaught and set about introducing the ECA. This Act would radically deregulate the labour market by practically deconstructing the entire

scaffold of the century-old industrial legal system. Consequently, the decade of the 1990s saw significant decline in union membership and with it, union power and influence. Trade union education wilted as many unions implemented crisis management survival strategies. The 1990s also saw the increasing adoption by New Zealand unions of a new union organising approach called the ‘organising method’. This approach was born out of the experiences of North American unions who had developed new organising initiatives in response to militant employer and government assaults on their memberships (Bobo, et al, 2001). Trade union education plays a critical role in the organising method, augmenting the development of workplace leaders and activists to build the union and unionism. With the dawn of the new century, there is once again statutory recognition of trade unions and legal provisions for paid education leave for union members in the form of EREL.

Trade union education: What is it?

Trade union education teaches people to be unionists. Most unions offer formal union education programmes, generally aimed at those workers holding union representative roles – such as the shop steward, delegate or health and safety rep. These formal union programmes are most likely classroom based – whether that classroom happens in a union office, on a marae or some suburban seminar facility. For non-representative union members there are a myriad of informal union education opportunities, such as can be found at stop-work or bargaining report-back meetings, union campaigning meetings or on a picket line. “The goals of union education are determined by workers who discuss their experiences and then express themselves through their (unions) as they struggle for better lives for themselves, their families and the members of their community” (International Labour Organisation, 2007, p1). Trade union education can be seen to operate in three spheres. The first, and arguably the most important sphere, is that broad range of learning for members that is about building the skills, knowledge and understanding that supports and augments the work of unions to achieve their industrial and political goals. The second sphere is the realm of workers’ education

– in areas like literacy, numeracy and general worker education initiatives. The third sphere is tertiary level union education initiatives, providing members with access to universities and polytechnics offering labour studies programmes. The focus of this thesis is on the first sphere of union education activity.

Development of trade union education in New Zealand

There is a long and rich history of working people's education in this country. There were some key initiatives that occurred in the late nineteenth century following the election of a socially progressive, liberal government in 1890. Early trade unions took a strong interest in workers' education and training, with strong support from a government committed to a model of welfare capitalism – a grand and complex compromise between capital and labour that promoted private ownership and production in return for working people's legitimate access to a range of resource and wealth distributive mechanisms (Law, 1996). The 1894 Industrial Conciliation and Arbitration Act created industrial awards and provided for centralised wage bargaining on a large scale for workers through their unions (Roth, 1984). During the twentieth century an emerging labourist, tripartite model of industrial and social relations saw the government, employers and unions as partners in the provision and development of workers' training and education. This model, however, placed significant emphasis on vocational, labour market-type training. There was much less accent on education that met the broader economic, social and political interests of workers, the type of learning promoted under the banner of trade union education. However, under the third Labour government (1972 – 1975), union education gained more recognition and momentum with the creation of the TUTB (Law, 1996).

Trade Union Education Authority (TUEA)

The push by trade unions for greater recognition and resourcing of union education in New Zealand was realised a decade later, again under a Labour government, with the establishment of TUEA in 1986. This organisation represented a far-sighted and highly progressive development in trade union education in New Zealand

offering a comprehensive array of skills, issues and critical based educational opportunities to unionists (Law, 1996). TUEA was charged with administering and promoting the Union Representatives Education Leave Act (UREL) and provided for paid education leave (PEL) as a union right.

“The UREL defined union education as that which assisted union representatives to become well informed about industrial relations and able to participate in an active and well-informed manner both in the affairs of any union to which they belong and in their employment” (Law, 1996, p166).

Arguing for an explicit political role to bring about progressive social change, Casey (1989) sees “(T)rade union education (as) about enabling working people and their unions to participate in an informed way in shaping our society and its future. It is about enabling workers to play a full, active role in all areas of economic, political, social and cultural life” (Casey, 1989, p14). Writing at a time in New Zealand when union members had access to PEL she tempers her grand vision of what union education could achieve, conscious of the constraints placed by the statutory provisions of PEL “that continue to place serious restrictions on our (union) activities” (ibid, p18). Notwithstanding this, Law (1996) points to the democratising influence of TUEA in providing opportunities for enhancing the quality of participation in union affairs by members who had previously been marginalised.

In 1988 I started working for TUEA on the State Sector Act education programme, an education initiative aimed at public sector union officials and representatives to enable them to gain greater understanding of a new, and somewhat unpopular law with public servants, that, among other things, brought the public and private sectors under the same employment legislation, the 1987 Labour Relations Act. The State Sector Act programme was not uncontroversial– and shines a light on the sometimes precarious and controversial role played by TUEA as a strongly union-

orientated organisation that was created, funded and ultimately controlled by a government following a neo-liberal economic reform path. However, this was a period in New Zealand's history that was full of contradictions and signalled the rapid unravelling of the welfare capitalist model brought about as a result of government's schizophrenic relationship with neo-liberalism, as it tried to balance its social democratic traditions on the one hand with a neo-liberal economic agenda on the other (Law, 1996).

TUEA and the impacts of a neo-liberal agenda

Workers faced even more troubled times with the defeat of Labour at the polls in 1990, providing the National Party an opportunity to implement its policies aimed at completing "the transition from welfare capitalism to a neo-liberal market economy by restructuring the labour market" (Law, 1996, p169). TUEA faced an insecure future as a result of the election of a National government, who were determined to accelerate the transition to a fully fledged neo-liberal market economy with the introduction of its flagship legislation, the ECA. This law dismembered the Labour Relations Act by abolishing national awards and centralised wage fixing, fragmenting bargaining to the enterprise and individual level, introduced voluntary union membership and reduced the status of unions to bargaining agents.

Early in his tenure as Minister of Labour, Bill Birch commissioned a full review of TUEA because he had "noted the apparent anomaly of trade union education (TUE), TUEA and PEL enjoying special status under the (Union Representatives Education Leave Act) when, under the Employment Contracts Act 1991....the trade unions had lost their special status among employee groups" (Trotman and Jackson, 1991, page v). The review team made a clear distinction in their deliberations between trade union education and employment relations education or ERE. While TUE was "often coloured by union philosophy and taught by trainers with an empathy to union members" (ibid, p40), ERE on the other hand spanned "all the cultural expectations of the workplace...covering all the inter-relationships within

the workplace” (ibid, p40). Clearly the Review authors were keen to see some type of statutory provision of ERE moving into an ECA environment and they made a number of recommendations to government to this effect. However, in the end the hard right ideologues won out and with the government ignoring every recommendation, opting to scrap TUEA and its parent legislation in 1992.

Unions and union education under the Employment Contracts Act (ECA)

The ECA had a cataclysmic impact on unions, workers and the New Zealand industrial relations system. The century old labourist orientated system, underpinned by a strong sense of tripartism, was demolished with the ECA decimating any notion of a partnership role for unions in the employment relationship and, beyond this, in a social setting. The ECA’s unitarist ideological orientation was diametrically opposed to the pluralist, arbitrationist philosophical tenants of the re-ECA industrial era (Fryer and Oldfield (1994); Deeks and Boxall (1989)). Unitarism essentially assumes no conflict of interests between employers and workers. That both have shared or common interests (‘what is good for the company is good for the workers’). There exists equal bargaining power between the employer and workers, but the imperatives of production are placed above everything else. The ECA assumed “the primacy of individual property rights” (Law, 2006, p169) with labour services being a property right. The Act turned workers into commodities to be bought and sold on an open, or ‘free’, labour market. All references to unions were purged from the ECA and other employment-related statutes, with the status of unions reduced to that of being third party bargaining agents negotiating employment contracts on behalf of workers and mediating employment disputes and grievances.

The ECA’s debilitating impacts on unions and workers have been well documented (Douglas, 1993; Franks, 2001; Charlwood and Haynes, 2008). Union membership fell dramatically during the 1990s as a result of the ECA. The new enterprise-orientated bargaining environment stretched many unions to breaking point. The Metal Trades Award – the largest employment agreement in the private sector was

negotiated by the Engineers Union and covered 30,000 workers in 1990. With the expiry of the Award at the end of 1991, the agreement was shattered into thousands of enterprise and individual employment contracts. Coupled with this there was a significant and in some cases, critical, drop in subscription income for unions from rapidly falling membership as the ECA had scrapped compulsory union membership.

With many unions struggling for survival under the ECA, some union leaders did not regard union education as a priority in the face of such a hostile and difficult industrial environment. With TUEA repealed and the consequent loss of paid education leave, along with a cadre of union educators, the amount of union education and training that was happening among these unions became negligible. And when the knives came out to cut costs and jobs, often union educators found themselves first in line to be made redundant. As an organiser – and later union educator with the Engineers Union – in the 1990s, I witnessed around me the severe contraction of the provision union education in both private and state sector unions.

A Future for union education beyond the 1990s

The ECA's heralding of a fundamental and radical shift away from a pluralist model of industrial relations led some unions and union officials to look for new approaches to build membership and ensure survival and relevance in a highly deregulated, hostile industrial system. It was at this time, within the union education networks that I was involved with, that trade union pedagogy became increasingly influenced by what was happening internationally – particularly the approach being taken by many North American trade unions and movements in regards to union organising and union education. I recall in the early 1990s, attending on different occasions education workshops run by progressive American union educators Valerie Ervin and Theresa Conrow. Ervin had been brought out to New Zealand by the Service Workers' Union – the forerunner to the SFWU. These educators introduced to a broad New Zealand trade union audience a new language in the form of the popular education philosophy espoused by Brazilian educator,

Paulo Freire, which embraced the development of critical thinking, collective empowerment and collective action for change. I can also recall the exploration of the relationship between union education and radical community education, and the radical organising approaches of the likes of Saul Alinsky and Myles Horton of the Highlander School in the United States.

Former Service Workers' Union educator, Paul Chalmers, was involved with organising the Ervin visit, believing that understanding more about North American union education and organising would help inform and stimulate the development of new strategies to counter the impact of the ECA:

“She ran a number of workshops for around three weeks. I then put together an organising conference at Turangi for the (Service Workers' Union) at which all staff attended and we outlined what the new future would look like. (We) got abused by a number of (union) officials...who basically said we would never have to organise in this way” (Chalmers, 2008).

The Service Workers' Union went on to collaborate with some Australian unions to produce a wide range of educational material and programmes centred on the organising method. The reactions of some union officials aside, the new organising methodology was adopted by many of the major New Zealand unions in response to the crisis brought about by the ECA, with international union influence being a key factor in its development. The 'organising method', as it became known, was about activating and empowering 'shop floor' union members to play a more prominent and active role in union bargaining, on-the-job union affairs and campaigning activity. Union education is a central feature of the organising method, particularly in relation to the activation and development of workplace activists – the union delegates, health and safety representatives and other workplace leaders. The organising method was seen to have the potential to be transformational for unions in terms of turning around their fortunes and building

their relative power and influence. The organising method could be contrasted to what was termed the ‘servicing model’, generally characterised by paid officials playing the primary role in all bargaining, dispute and grievance handling with only a peripheral involvement of members in these activities. This approach represents a transactional, fee for service, relationship between a union and its members. The type of relationship, it could be said, that was encouraged and promoted by the ECA and its acolytes. Today the SFWU openly identifies itself as being an organising union: “This means we’re a collective of workers who are about improving the lives of workers and working for a fair and just society by organising for strength, power and unity on the job, in our industries, our communities and society as a whole” (SFWU, 2005, p30).

A new century and the introduction of ERE

One of the first acts of the incoming Labour-led government in 1999 was to repeal the ECA and replace it with the Employment Relations Act 2000 (ERA). The object of the new law was a far cry from the ECA and was aimed at building “more productive employment relationships through the promotion of mutual trust and confidence”.⁵ Three central features of the ERA are, (i) the reinstatement of legal recognition of trade unions; (ii) the role of trade unions in addressing the “inherent inequality of bargaining power”⁶ between workers and employers through the promotion of collective bargaining; (iii) the introduction of the duty of good faith to apply to all parties involved in the employment relationship. Part 7 of the new Act introduced EREL, requiring employers to provide union members with paid leave, in the form of ERE to attend union education courses approved by the Minister of Labour. According to the DOL, “the aim of ERE is to increase skills and knowledge of employment matters to improve relationships in the workplace and enable employers, employees and unions to deal with each other in good faith”.⁷ The Act also established a contestable fund enabling unions and employers to

⁵ Employment Relations Act 2000, Part 1, Clause 3 – Object of this Act

⁶ Ibid

⁷ Background section, application guide for employment relations education course approval. Retrieved 15 June 2008 from http://www.ers.dol.govt.nz/ere/ere_course_guidelines.html#background

access funding on an annual basis to develop and facilitate education programmes designed to promote the object of the ERA.

The current system of ERE has clear limitations, especially in the quantum of leave available to unions and the bureaucratic, administrative and political issues attached to its use by unions (CTU, 2007). Nonetheless, the overall union contribution to education in New Zealand is considered very significant: “(The) sum is enormous – significant numbers of delegates attending training each week, thousands of trained health and safety reps, unions have a major influence on education policy, a rapidly developing programme on productivity education and on workplace learning” (CTU, 2007, p4).

How EREL Works

Part 7 of the ERA outlines in detail the mechanics behind the operation of EREL. The overarching responsibility for the administration of this section, as with the whole of the Act, rests with the DOL. A short summary of how EREL works is set out below:

Unions are responsible for annually allocating the number of EREL days that can be used by union members. EREL is calculated on the basis of the number of union members, or what the ERA refers to as ‘eligible employees’, who belong to a union in each company where that union organises. The union uses an annual cut-off date to calculate the aggregate EREL entitlement, based on a formula outlined in the Act, and writes to the company outlining the number of days that may be used in the coming year.⁸ To access EREL, a union member must be attending a course that has been approved by the Minister of Labour. This requires unions to write and submit courses for consideration by a panel of experts, a sub-group of the ERE Advisory Committee, made up of union and employer representatives. Programmes

⁸ Part 7 of the ERA provides the statutory minimum entitlement to paid leave for union members. It is worth noting, however, that there are significant numbers of union members who have access to leave provisions in excess of the statutory minima, achieved through bargaining for collective employment agreements that recognise union education leave entitlements over and above what are provided for in the Act.

being considered for approval for the use of EREL must be deemed to be consistent with the purposes of the ERA. A comprehensive, but not exclusive, list of criteria for consistency with the Act has been published by the DOL as a guide for the development of courses⁹. Approval for EREL-related programmes lasts up to five years. The EREL-approved courses as outlined in Appendices 1 and 9 have all been through the process described above.

Conclusion

In this chapter I have outlined how the State has played a significant role in the development of trade union education in New Zealand. In the late nineteenth century worker training and education won government support, in line with the development of a tripartite consensus – encompassing the State, employers and unions, around what has been termed welfare capitalism. This ensured a prominent and protected place for private enterprise in a developing industrial capitalist economy, with the State taking responsibility for ensuring there were adequate wealth distributive mechanisms in place that included the recognition of trade unions and their role in a centralised wage fixing system. Throughout the twentieth century there was a significant emphasis on vocational type training for workers, with little recognition in the way of a broader learning agenda, beyond learning skills for work, which could be accessed through trade union education. The responsibility for resourcing and facilitating this learning rested with the unions themselves.

Towards the end of the century, the State, under reforming Labour-led governments, remedied the lack of legislative recognition of trade union education by creating statutory bodies designed to promote and enhance access for union members to a broad trade union education programme. Most significant of these bodies was TUEA, which administered an Act providing paid education leave for union representatives. However, the role of the State as sponsor and funder of trade union education began to falter with the adoption of a neo-liberal economic agenda

⁹ See www.ers.dol.govt.nz/ere/ere_course_guidelines.html#consistency

seen often to be counter to the interests of workers and their unions. The progressive ideals for a fledgling TUEA looked unattainable in the face of an economic system that was putting production ahead of everything else. As it turned out the life of TUEA was a relatively short one, disestablished by a National government which saw no recognised role for unions or the need for statutory recognition of trade union education. In difficult times, unions began to look for new approaches to re-building membership and their power and influence, with international union officials and movements being influential. Some prominent unions saw the need to organise workers from the grassroots up, democratising their organising efforts, and trade union education was seen to play a central role in achieving this.

In the twenty first century a Labour-led government again restored statutory recognition of unions and provided access to paid leave for union members in the form of EREL. This leave has been popular with unions that, together with an annual contestable fund, has enabled union education to again play a central and critical role in focusing on rebuilding the power and influence of unions following the decimating effects of the ECA the previous decade.

Chapter 3

LITERATURE REVIEW

Introduction

The lack of visibility of research on union education reflects the fact that the union movement, to a large degree, is built on strong oral traditions and not the written word. This absence from the literature may also be explained by the lack of academic interest and dismissal of the contribution of working-class learning that occurs within worker-controlled activity systems, including trade unions (Livingstone and Sawchuk, 2004).

This chapter takes a critical look at the literature that relates to the question at the core of this project, 'Employment Relations Education: Learning for a change?' This question asks if ERE can facilitate a learning process that leads to the kind of change that unions want to achieve for their members. This project takes the stance that unions are not social organisations that exist for the sake for maintaining the status quo as this is manifested in the world of work and throughout broader society. Unions are not about blunting the sharp edges off an unjust, unfair and exploitative economic system to make it more palatable. In essence, unions stand for the democratising transformation of the world of work, and in turn the society which shapes and sustains it. This stance is tested against what the literature says about the role of trade unions and the place of union education within unions. It also examines what transformation means in a trade union context, and the role that can be played by union education in the transformation process.

Defining the ideological orientation of trade unions

A union education programme operates within the structural and ideological confines of the parent union within which the programme sits. The ideological orientation of a union may inform to what degree a union is involved with driving an agenda for change. Newman (1993) in his seminal study of union education in

Australia identifies unions as falling within two broad political and philosophical orientations. One can be called the gradualist and politically centrist orientation of labourism. The other is described as radicalism, being an “idealistic, essentially revolutionary, orientation” (Newman, 1993, p221). In a Canadian union context a similar dualism exists represented by what is known as business unionism and social unionism (Gairey et al, 2004). In the Philippines, the Alliance of Progressive Labour (2006) provides an example of a movement taking a radicalist approach with its model of social movement unionism that aims to change people’s consciousness and understanding for action. “Such new consciousness in turn leads to actions that actually change the lives of workers for the better. Transformation, after all, becomes possible only when they come from real understanding and commitment” (ibid, 2006, p11).

Underpinning the radicalist orientation taken by unions is the notion that capitalism is essentially exploitative and unjust and should be replaced by a new and different economic and social system. Labourists on the other hand argue that the wages and conditions of working people are progressively improved by negotiation, the use of legislative and state sponsored apparatus, and facilitated through the actions of a strong labour movement working in conjunction with union-friendly governments. Given the closely aligned industrial genealogy between the Australian and New Zealand union movements, the labourist and radicalist orientations relate well to how unions are orientated in this country. However, it would be too simplistic to view these models as distinct entities. Arguably it would be more appropriate to use a labourist-radicalist continuum which affords a degree of blending and cross-pollination between orientations.

Trade union education: A democratising force?

Writing at the sunset of the Australian Labor government’s incomes accord (the ‘Accord’) struck with the Australian Council of Trade Unions (ACTU), Newman (1993) describes the pragmatic labourist ideology as informing most union training and education in his country and points to the potential for internal transformation

when he says union educators could either work to reinforce the hierarchical structures of the union or be democratising agents. This was a period when many Australian trade unionists had become disenchanted with the Accord, seeing the ACTU-federal government agreement as ineffective in delivering for ordinary union members at the shop floor level in terms of wages policy and outcomes. Newman (1993) believed it was a time when union educators could play a lead role in democratising their unions. “(They) 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” (Newman, 1993, p.270).

Devos (1998), influenced by Newman and others, describes a dialectic between the two dominant discourses within the Australian trade union education context - being a discourse of struggle based on an inherent conflict of interests between labour and capital, and a discourse on economy that draws “heavily on concepts of consensus and cooperation” (Devos, 1998, p85). She argues that these two dominant discourses of struggle and the economy have taken shape antagonistically, presenting difficult challenges to union educators who attempt to manage the conflict-consensus dialectic in their work.

The aims of trade union education

This study is one that aligns union education with the goals of the broader union movement, being the building and procurement of a democratic, just, fair and equitable society (Thomas and Martin, 2002). “We want labor education to strengthen class-conscious activism, to build community and solidarity, to advance equity, to develop democratic processes, and to build effective labor organisations that contribute to a wider common good” (Thomas and Martin, 2002, p239). Further, union education promotes the recognition of work as a fully human activity that can be effectively articulated by the collective voice of the union (Coats, 2004). For union education to be effective Jesson (2001) argues the need for the New

Zealand union movement to develop multiple education pathways for members, recognising that each union operates within its own cultural context, encompassing their own social, political, industrial and historical orientations. To clarify the overarching objectives of union education Jesson (2001) uses the theories of German political sociologist, Claus Offe, who maintains that unions and collectivism each have a different focus. The first is the monologic “and is contained in the bargaining relationship between capital and labour” (Jesson, 2001, p2). The second focus, the dialogic, “extends to the broader political and social responsibility that unions carry to the working class and for future ideals for society” (ibid, p2). Jesson maintains unions must work to extend the concept of education “beyond the narrow bargaining relationship” (ibid, p2) to encompass the movement’s broader social and political goals. Gouthro (2002a) discusses Habermas’s theory of communicative action and its contribution to “human potentiality for learning, problem-solving and advancement” (ibid, p1). The institutions of civil society, of which trade unions can be named, are an “essential aspect of adult learning for active citizenship, a means through which education can foster democratic forms of social learning” (ibid, p4). Restricting the role of union activity and education to a monologic focus is well recognised, and is said to reflect the role of the marketplace in influencing the discourses of lifelong learning (Gouthro, 2002b).

The politicising effects of the organising method

During the 1990s in New Zealand a new organising methodology began to gain traction with many key unions in the face of a hostile and difficult industrial environment produced as a result of the ECA. The theories and practices that informed the ‘organising method’ were influenced by the experiences of international union movements – particularly those from North America. The organising method was about activating and empowering shop floor union members in order for them to play a central role in union bargaining and broader campaigning activity. This method has the potential to be transformational for unions and can be contrasted to what is known as ‘servicing unionism’, characterised by paid officials carrying out most of the bargaining, dispute and

grievance handling, with only the peripheral involvement of members. Servicing unionism represents a transactional, fee for service, relationship between a union and its members. There is a corollary here to the business (servicing) and social unionism (organising) orientations of North America. Newman (2002) says the organising method facilitates the politicising of union workplace representatives and members to take on activist roles, and that “all union education should be located within an analysis of the political economy and directed towards the mobilization of working people” (ibid, p164).

A system built to resist change

The economic and political forces operating within society invariably maintain and reinforce the status quo, resisting changes to the dominant social order and structures. Workers may acknowledge to some degree the unfairness or injustice in their world, but they often accept this as being an immutable reality, reflecting an internalisation of the multiple oppressions that can be found in a capitalist society (Livingston and Sawchuk, 2004). The choices for workers for change are very limited as they are subsumed by a Gramscian hegemony with such choices being too hard to make, leading to resignation in the face of those who hold power and control in society (Newman, 2006).

A transformative learning approach “tends to be positioned in opposition to (hegemonic) reproduction, where learning functions to accommodate workers to exploitative, hierarchical structures, subjugating people and reproducing existing (inequitable) power relations” (Fenwick, 2008, p114). Giving workers the tools to think and act critically in relation to their world can prepare the ground for change. One important tool is structural analysis.

In referring to the work of French theorist Louis Althusser, Brookfield and Preskill (2007) outline the intellectual tradition of structural analysis that can be used to critically view how social structures that are inherently unjust are able to

perpetually reproduce and maintain themselves. A key focus is the role played by the formal schooling and education systems that operate in society:

“Structural analysis views education as an ideological state apparatus...that works to ensure the perpetuation of the dominant ideology. It does this by partly teaching values that support that ideology, and partly by immersing students in practices that are ideologically determined” (Brookfield and Preskill, 2007, p249).

This view mirrors the banking theory of education as developed by Freire (1996). This system treats students as objects and empty vessels in subjugated relationships with teachers and their institutions. The ‘expert’ teachers are responsible for filling the heads of students with knowledge. In a process where students are assimilating the dominant ideology, as determined by the expert teacher, it can become difficult to be engaged in dialogical, potentially transformative, forms of learning (Mayo, 2004). Newman (1993; 2006) argues that much within the sphere of adult education does little to fundamentally change society’s power and social structures, with it being “simply too nice, too self-centred or too concerned with maintaining the status quo” (Newman, 2006, p58). A union education approach that uses a critical lens to view society’s social structures, coupled with action, is required as a first step towards achieving the desired transformational outcomes:

“(If) we are to engage in learning in order to act on and change our social or political world, then we need to examine who is trying to lay our futures out for us, who is telling us what we should and should not do, who is holding us back, and who is preventing us from acting effectively in our own and in others’ interests” (Newman, 2006, p58).

Taking a critical approach to learning

Developing the capacity for critical thinking is a fundamental tenet of union education. Martin (1995) describes this critical dimension and the union educator's "political role (in the classroom)... to weaken, carefully and skillfully, the hold of dominant ideas ... and to strengthen the emerging good sense as part of equipment of an increasingly confident social movement" (Martin, 1995, p115). Adult education for critical thinking "helps us explain how knowledge, consciousness and power are generated and controlled, and then how knowledge, consciousness and power can be (re)generated and controlled in ways that will enable all of us to live in equitable, peaceful and sustainable ways on a habitable planet" (Newman, 1999, p56). To understand how to use critical analysis in a trade union context, Sutherland (2004) argues that union activists need to start with asking the following range of questions:

- What's wrong, why and what caused it to happen?
- What do we want instead?
- What will it take to win it?
- Who will be against us? Who will be with us? How will we set out to win it?

This intense questioning and torturing of the current, uncritically assimilated knowledge reflects the teaching theories of Freire, who has strongly influenced the development of union education internationally. His method of problem-posing education, in contrast to the banking model, means "(the) pedagogy applied is not that of 'the answer' but that of 'the question'" (Mayo, 2004, p55).

In a union learning context, the conditions for transformation start with a democratic learning relationship, as can be found in the union education classroom. "Freire considered both educators and educatees as subjects in a humanising relationship marked by solidarity" (Mayo, 2004, p51). It is a relationship whereby the educator is also a learner and the educatees are themselves educators. In this democratic classroom, with a dialogical relationship between teacher and student,

there is the potential to know and re-know the object, to transform the dominant form of knowing into new worker-understood forms of knowing. This knowledge needs to be applied in a critical pedagogical process of action, reflection and transformation action, or what Freire termed 'praxis', "whereby people act on their material surroundings and reflect on them with a view to transforming them" (ibid, p48).

McLaren's (1994) treatise on critical pedagogy outlines strong arguments in favour of its potential for social transformation. "The invitation posed by critical pedagogy is to bend reality to the requirements of a just world, to decenter, deform, disorient, and ultimately transform modes of authority that domesticate the Other, that lay siege to the power of the margins" (McLaren, 1994, p537). Mohanty (1990) also promotes education for critical consciousness as the method for radical social transformation, arguing for systematic politicised practices of teaching and learning that challenge the traditional production of knowledge and its location within existing hegemonic histories.

A critical pedagogy may not be the exclusive domain of non-formal education. Schurman (2003) has been integral in the process of achieving formal recognition for the National Labor College (NLC), a US-based union education facility. "(There) is no inherent reason – apart from political power – that popular education methodology cannot serve as the foundation for formal workers' or labor education" (Schurman, 2003, p205). The work of Freire informs much of the NLC's teaching philosophy. However, there is some resistance to college participation coming from the union hierarchy in response to the development of critical consciousness among union members and the perceived threat this may pose to union unity. "Union culture in the United States is based on strict notions of internal solidarity as the basis of collective power" (ibid, p208). However, Freirian teaching methodologies enable "(union) members to take responsibility for reshaping their institutions in constructive and politically accountable ways" (ibid, p216).

The workplace as a site for learning

While the democratic union education classroom can be a site for building critical consciousness, a worker's everyday experiences at the workplace also have the potential to provide powerful, informal, learning opportunities (Keep, 2008). According to Fenwick (2008), learning in work can be placed along side socio-cultural conceptualisations "that view learning as embedded in everyday practices and social relations" (ibid, p112). In this context, learning is understood to be "an expansion of capacity with focus on action that builds individual and collective agency, particularly to enhance workers' well-being and critical awareness of work structures, to foster more equitable structures, and to increase workers' control over their activity" (ibid, p112).

The workplace is a site where there is often glaring evidence of a power imbalance between an employer and workers. In unionised workplaces there is a regular expression of collective agency and development of critical awareness, fostered by a range of union organising and bargaining activities augmented by union education programmes. In terms of transformation, the workplace can be a place where new ideas and approaches are forged that can lead to fundamental and sustainable changes in the quality of working life. For example, this may take the form of collectively winning significant pay increases or contractual provisions for better hours of work. However, in the modern workplace it is still common to find the workers' voice marginalised and absent from real or substantial decision making, as many employers adopt a neo-Fordist approach denying meaningful opportunities for workers to impact their work environment (Livingstone and Sawchuk, 2004; Weststar, 2007). In some particular situations and under the right circumstances, workers' input and voice, as articulated and represented by strong union organisation, is accommodated by employers (Olson, 2005). But unions have far to go to counter a dominant unitarist view of workplace relations that offers little in the way of a sustainable or productive role for unions (Booth and Thompson, 2008).

In the United Kingdom, Forrester and Payne (2000) argue that the historic emphasis within union education in that country has always been on representative training rather than education for working life. However, government policies for adult learning may have the potential to create new learning opportunities for union members. Sutherland (2002), in his experience of running the education section of Britain's largest trade union, sees a critical role for unions in driving learning in and around the workplace - for employment security and developing active citizenship: "If (unions) are to continue to be in the forefront of creating a thriving democracy with cultural wealth and economic health they have to ensure their strategies on workplace learning contribute to wider policy making aimed at enabling the whole population to become continually engaged in learning" (Sutherland, 2002, p114). But government learning initiatives at the workplace can have clear limitations for workers. In Britain, Keep (2008) says the development of public policy around workplace learning has taken place in a theoretical vacuum ignoring any notions of social theories of learning and notions of the workplace as a site of social relations to the detriment of opportunities for many workers.

Political action and class

A key outcome from trade union education programmes can be greater political consciousness. Foster (2004) defines being politically active as engaging "in political behaviours unusual for the average citizen and that require consciousness, commitment and public identification" (Foster, 2004, p14). There are four factors that shape the unionists' decision to become politically active. "(How) they define class, their sense of political efficacy, their experience of the political "class divide", and if the union actively fostered political activity" (ibid, p17). This last point clearly resonates with this study, with the SFWU actively involved in fermenting political consciousness and activity among its membership – in the classroom or in the relationships between officials and members.

Issues of class are an important dimension of this study. The research cohort is made up of a group of working class member-activists. Foster (2004) sees class

both as the objective conditions of production and as a social construction.

“Workers are part of the working class because they possess a common relation to production – they must rent their labour power. But to give class any real meaning, we must acknowledge the ‘working class’ is also constructed by workers through their lived experience” (ibid, p14). This “lived” experience happens wherever you find workers – on the job, at the pub, socialising and in the home. The cohort members do not explicitly articulate their understanding of class consciousness in this study, but this informs their narratives. “(Their) sense of class arises from their lived experience of being a worker. Their expression of class is dominated by the language of living the life of a worker – the feeling of being governed by the alarm clock and by others for their livelihood” (ibid, p20).

Union education, it is argued, and its impact on the job has the potential to play a key role in building union relevance and revival in the workplace in the face of years of significant membership decline due to hostile regulatory frameworks, the aggressive adoption by employers of neo-liberal practices and an increasingly competitive global environment (Forester, 2001, 2005; Sawchuk, 2001). “Trade union mediated learning need not be limited to simply training stewards and collective bargaining, but can be a tool that fuels ongoing participation in the shaping of both a union agenda and an alternative vision of work and learning” (Sawchuk, 2001, p345). Union education can also be the catalyst for encouraging traditional non-participants in adult education to seek higher learning opportunities (Ball, 2002).

ERE and evaluation

Most trade union education in New Zealand is facilitated under the ERE provisions of the ERA. As outlined in the previous chapter, the administration and quality control of ERE rests with the DOL. One key process involves unions gaining approval for the use of EREL to get union members off the job on paid education leave. According to Jesson and Beaumont (2001) there is a risk of the ERE approval processes being colonised by methods and content from the technocratic

adult training model. “Quality control mechanisms for union education need to take on positive aspects from adult education but guard against technocratic and functionalist processes” (Jesson and Beaumont, 2001, p10).

There is scant research on evaluating the impacts of employment relations education in New Zealand. However, Nunns et al (2008) in a report, commissioned by the ERE Advisory Committee, evaluates two ERE courses – one offered by Business New Zealand, the other by the NZ Council of Trade Unions (NZCTU), titled ‘Organising in our Industries’. The NZCTU course had been run for a group of union delegates and officials drawn from unions working in the food industry. “Participants said they came away from the workshop with wider and more informed perspectives, increased personal confidence, networks of contacts and renewed direction and focus. These benefits are significant, given a NZCTU key informant’s description of some workshop participants as non-traditional learners who may not have been involved in formal education or training since leaving school” (ibid, 2008). What transpired on this course appears to contain the seeds of transformational change in terms of what participants were saying, thinking and feeling as a result of attending. However, on their return to work participants from the union workshop found many barriers in place that inhibited their ability to affect any significant change. Issues such as the voluntary nature of the delegate role and shift work made things difficult for them. “Respondents are attempting to lead or facilitate change in large organisations. Some had little, if any, support from management and other members” (Ibid, p27). In attempting to apply what has been learned to the work context Doyle (2004) identifies a range of factors that can manifest as barriers to learning transfer, including position within the organisational pecking order. Ultimately, however, workplace learning - what and how it is learned, particularly in the non-formal context, is significantly influenced by power relations in the workplace (Evans and Rainbird, 2002).

Conclusion

The primary foci of trade unions within capitalist economies is to address the imbalance of power that exists between workers and employers, to achieve wage justice for members and to counter the hegemonic forces operating in the broader economic and political system that act to produce and perpetuate social injustices and inequities. Union education and workers' informal learning play a key role in realising the aims of the union movement, as against capital's aim to restrict the role of the unions to a monologic, wage bargaining-only relationship. To break the shackles of hegemonic domination and subjugation, and to address the broader interests of workers, trade unions need to facilitate a critical learning agenda. This can enable workers to see the true exploitative nature of the system within which they work and gain new critical insights into their world so they can start to act collectively to change it. Workers can come to see the nature of the coercion and consent that operate in society that has the effect of maintaining hegemonic domination. A critical learning process can occur via multiple pathways and processes acknowledging the lived experience of workers on the job and in their personal lives. The workplace can be an important site for the development of critical understanding and this potential has been recognised by trade unions. The democratic trade union education classroom creates a unique opportunity to bring workers together to weave the multiple strands of their informal and formal learning experiences so they can collectively examine and problematise their world, with a view of how they can create a better one. A recent study has shown ERE can be a vehicle where this can happen, where participants develop a programme to bring about change in their workplaces. However, in this example we are reminded of the hegemonic forces that operate at work and beyond. These forces, by their very nature, will always make it arduous to advance a progressive workers' agenda for change.

Chapter 4

DESIGN OF STUDY - METHODOLOGY

*“We learn from our formal training and from our campaigning activity”.*¹⁰

Introduction

The context and purpose of this study significantly influenced the design and methods that I chose to use. At a practical level, in terms of the scope and scale of this study, I wanted the number of member-activists that would be participating to be manageable in recognition of what I would be able to achieve given I was in full-time paid employment, as well as leading an active life with my family, friends and community. Also, I wanted the member-activists to live and work in Wellington so as to facilitate ease of face to face access to them, and them to me. Balanced against this was the desire to ensure this study would be a valid piece of academic research and one that could be held up to scrutiny. I also wanted the study to reflect the realities of life for workers in a union context and my role as a union educator working to ensure that I can make an effective contribution to our union movement’s aims of creating a fair, just and equitable world for working people - at work and in their communities.

I wanted to work with a group of union delegates and activists for this research project that did not come from my Union. I felt I could not work with EPMU member-activists as I would be too familiar, too close – for both the participants and myself, leading potentially to significant power-over issues that would distort and invalidate the purpose of this study. I chose to work with a private sector union because of my understanding of this sector, developed as a result of nearly 20 years of union work experience. In Wellington, the range of private sector unions offering

¹⁰ John Ryall, SFWU National Secretary. Delegates’ Meeting at SFWU, Petone. October 24, 2007.

a comprehensive ERE programme was limited. In the end this research project involved a group of Wellington-based workers who were active in the SFWU, either as elected delegates representing and advocating for their members, or being involved in their Union's democratic structures, or both. In terms of group demographics, I set out initially with a view that I wanted the members to be 'representative' of the SFWU's activist population. Two criteria regarding group composition that I discussed with the SFWU prior to setting up the research group were gender balance and a history of ERE. As a male researcher, I felt that it would be beneficial to the research process if we had a gender balance. I am aware of the potential for gender to influence and distort the research process.

A definition of methodology

Methodology is not something that is easily categorised or defined, neither is it something that can be boxed and disposed of in one section of this thesis. My research methodology is ever present and constitutes the warp and weft that makes up the fabric of this study. Clough and Nutbrown (2002) argue methodology is about making research decisions and understanding, and justifying, why we have chosen to make those decisions. "Our research methodologies are ...rooted in our own personal values which, in some form, inform our ethical and moral responses to problems and challenges" (Clough and Nutbrown, 2002, p68). I have a strong desire to be transparent with the readers of this study about where I am located in this research, what I bring to it insofar as striving to expose at all times my own beliefs and assumptions about the world and how I can know these things. If I did not do this I am in danger of producing a study with conclusions at best that are self-deluded or at worst, dishonest and deceptive. "It is the task of methodology to uncover and justify research assumptions...and in doing so locate the claims which the research makes within the traditions of enquiry which use it" (ibid, p31).

"All social research sets out with specific *purposes* from a particular *position*, and aims to *persuade* readers of the significance of its claims;

these claims are always broadly *political*” (Clough and Nutbrown, 2002, p14).¹¹

Finding an appropriate social research paradigm

I wanted to ensure this study would be heavily weighted towards collaborating with those who are involved with the research project and that it would be undertaken from the perspective of being orientated from the inside-out rather than outside-in. This would reflect my position and values as a union educator and activist working with a group of fellow union member-activists. It recognises that we are part of the same union movement that stands for representing and advocating for workers, and upholding and advancing their interests. This study would also need to recognise that working people, and the member-activists that are involved with the study, are agents of their own activity. They do not see themselves as objects or human resources whose only purpose is to fuel an economic machine over which they have little or no influence and control. They are well aware of the disparity of power that is inherent in the world of work. I did not want to take a research approach that would replicate and compound this power imbalance and so alienate them further.

Clough and Nutbrown (2002) recognise three broad headings as defining the field of social research. These are the normative, interpretative and critical paradigms. In choosing which paradigm to locate the methods used in a research study all three need to be considered as “the real choice is that combination of (all) which makes use of the most valuable features of each” (Clough and Nutbrown, 2002, p15).

Taber (2005), writing from a critical feminist perspective, argues that traditional, masculine, position-less, disembodied research approaches established truths at the expense of “invisibility and distortion of female experience” (Taber, 2005, p3). She is emphatic in her rejection of modernist, positivist approaches to research. “It is vitally important to move outside the objective, rational, cut and dry, non-experiential, emotionless world of research” (ibid, p4). Truth, or reality, is very

¹¹ Italics are the authors

much a social and personal construct and in this context can be vary significantly in terms of the researcher's orientation to key factors such as gender, race and class (Etherington, 2004).

Critical social research

I wanted this study to have its roots in a predominantly critical orientation. Critical theory is in itself a broad and complex field of enquiry and therefore defies simplistic definition. However, according to Kincheloe and McLaren (2008), a criticalist is a researcher who attempts to use their work as a form of social or cultural criticism, accepting certain basic assumptions relating to the nature of power relations in society, values, ideology, social relations of capitalist production and consumption, language, privilege and oppression in all its forms.

“(Mainstream) research practices are generally, although most often unwittingly, implicated in the reproduction of systems of class, race and gender oppression” (Kincheloe and McLaren, 2008, p405).

“(All) research claims are made in complex social and cultural situations in which power relations are naturally present....(and critical researchers say) the more we reduce power differences so that participants have an equal ‘say’ with researchers, the closer we come to making valid statements” (Holly et al, 2005, p213).

In terms of design, I took the position that I was not going to own the research process. I would set out to make it a collaborative effort, one of collective endeavour, carried out in the spirit of unity with the group of member-activists. The research cohort was made up of knowing, active agents in the generation of knowledge that is important to their lives. This does not deny that I was unaware of the gender and ethnic differences between us, or the varying degrees of cultural capital brought by each member-activist and myself to the study, or, most importantly, the over-arching power relations that existed between us. I was aware that I was the one who initiated this study. The collection of member-activists

involved in this study did not come to the realisation one day that they needed to participate in an academic research project. A key feature of the design of this study would be how I could democratise the project and give real voice and input to those who were involved.

Participatory Action Research

This study has much in common with the tenets of Participatory Action Research (PAR), being an approach that is deliberately 'biased' towards the least powerful with a high level of engagement and collaboration between the researcher and the researched and its orientation towards achieving social justice and equality (Hall, 2001; Cresswell et al, 2007). However, even though a participatory research orientation may be framed in a liberatory context, relations of power as expressed through gender, class and race can still be masked and must be exposed. To address this a "contemporary practice of participatory research must draw deeply upon the practices of feminist activism" (Hall, 2001, p175). In discussing the work of feminist activist educator, Jane Thompson, who has worked extensively with working-class women, Newman (2006) says she "affirms the individual, passionate and personal statements that ... helps women articulate as equally, if not more legitimate ways of knowing" (Newman, 2006, p57).

"Participatory research attempts to breakdown the distinction between the researchers and the researched, the subjects and objects of knowledge production by the participation of the people-for-themselves in the process of gaining and creating knowledge. In the process, research is seen not only as a process of creating knowledge, but simultaneously, as education and development of consciousness, and of mobilisation for action" (Gaventa, 1988, p19).

Giving voice to the research participants

In my work as a union educator I am aware that I need to strive to give members the space, tools, confidence and ability to articulate themselves. I need to enable them to describe their world, their issues, their needs and wants, through their own narratives. However, it would be naïve and dangerous to assume that this is easily achievable for there will be many factors that inhibit the effective telling of a member's story, including whether the often marginalised worker possesses the resources of various cultural capital to achieve full articulation (Bourdieu, 1997). For this study I was aware that I was working with a group of workers whose narratives, views and understandings are very rarely found in academic literature. I needed to ensure that the narratives of the quietest or the most contrary would be amplified. In this respect, I saw the most important task for this study as ensuring it gave the member-activists voice so that their narratives would be heard loud and clear. This would provide a study whose conclusions reflect their truths.

“The research act of listening to voice must always involve the (broadly defined) processes of both mediation and translation; and these functions may be particularly indicated where there are doubts about the capacity of the subject to express an intention; doubts, that is, about his or her powers of articulation. This is, of course, a function of a much larger question of the power relations between researcher and the researched” (Clough and Nutbrown, 2002, p71).

The method of focused conversation

The central method used in this study was focused conversation, described as being a collaborative research approach in both the gathering of the data and writing up of the research findings (Clough and Nutbrown, 2002). I was attracted to the use of this method for this study on the basis of its potential to be a democratic, inside-out approach, and the opportunity provided to the research participants for their voices to be heard. “What is different about (the) writing which emerges from focused conversation work is that the group participants do not simply provide the quotes,

they co-author the whole piece” (Clough and Nutbrown, 2002, p76). The process would involve establishing an agreed topic of discussion, in this case ERE, then holding a series of conversations as a group where the topic, or other pertinent issues that may emerge, would be discussed in depth. The sessions would be recorded and transcribed, and the transcripts returned to each member-activist for their further input and possible reshaping of what had been initially discussed. This process would be repeated after each session, until it was felt there was agreement that the words reflected the collective meaning and expression of the group.

The use of triangulation:

In terms of methods I did not want this study to be one dimensional in relation to how the ‘knowledge’ that would emerge from the project was arrived at. For validity purposes it needed to reflect the multi-dimensional nature of such a collaborative project. In this sense, it was important to recognise there are a multitude of possible dimensions represented with this project, reflected and refracted in the form of a crystal rather than a three sided, fixed triangle (Holly et al, 2005). This study is a dialogical text, one in which the reader and writers of this research bring their own meanings and understandings to the words, ensuring the Other is not just the object of an academic study.

“We build triangulation into our studies by using multiple sources of data, multiple methods, even multiple theories to develop diverse perspectives” (Holly et al, 2005, p214).

Interviewing SFWU officials

I wanted to provide a broader perspective of ERE from the view of the two officials that played a key role in facilitating the development of this study – SFWU national secretary, John Ryall and SFWU educator, Jody Anderson. I wanted to wait to interview John and Jody until I had finished the research cohort meetings so I could inject into the process some of my early interpretations of what the member-activists were saying about ERE. Given time constraints, and the difficulty of

having to try and arrange separate meetings with John and Jody, I opted to interview them both together. As with the research cohort meetings, I transcribed the interview and returned it to John and Jody for them to review and make further comments.

The use of journals by participants

Applying the crystal metaphor to the study I encouraged the member-activists to keep a journal that would be a reflection of their experiences in participating in this project. I provided each of them with A6 sized notebooks for this purpose. I hoped this journal could capture in their words the whole range of their learning, feelings, anxieties and emotions that would come about as a result of participating in the study. The member-activists' journals are included in verbatim form in this study as a true reflection of their narratives. I attempt to use what Denzin and Lincoln (2008) refer to as a montage to create and enact moral meaning taking the form of a dialogical work that enables the reader and writer to make their own meanings adding to the study "rigor, breadth, complexity, richness and depth" (Denzin and Lincoln, 2008, p7).

For the duration of the project I kept two concurrent journals – one a written hard-copy and the other electronic (on my laptop computer). The two forms tended to have syncopated entries with the written journal generally staying at home and the lap-top following me to the office and on the road in my work as a travelling union educator and official. The journals recorded events and my ideas, thoughts and emotions, and have in themselves provided me with a personal backdrop of material to mine for use in this project.

The use of photographs

There is an appropriate old phrase that is commonly used that says, 'a picture paints a thousand words'. This informed the thinking behind providing the research cohort with cameras. The idea of using cameras as a research tool emerged during the study and represents an attempt to get the narratives of the member-activists

portrayed in a different dimension, but one that could provide expressive impact. Following the cohort meetings, and the distribution of journals, I felt I still needed to give the cohort participants the opportunity to express themselves in another way. If they were going to be struggling with writing, and clearly some among the cohort were, the camera could be a viable option for them. In mid-May 2008 I sent everyone in the cohort, except Tractor, a disposable camera with a covering letter (see Appendix 10). Tractor had stated categorically when he returned his journal to me that he did not want a camera because he considered himself to be a “lousy” photographer.

Other methods of data collection

To compliment and augment the work being carried out with the research cohort and in the one-to-one interviews, I used access to DOL and union documents and publications to supplement the data collective process. This was carried out over the duration of the study, starting mid-2007 and going through to October 2008. Access to this information was facilitated by key government and SFWU officials.

Conclusion

I attempted with the design of the project to take a fully participative and collaborative approach. In line with my union principles, this study takes an ‘inside-out’ approach, as against a positivist, traditional approach of ‘outside-in’ research. I have tried hard not to do ‘research on’ – but ‘research with’ those union member-activists who made up central participants in the project (a group I call the ‘research cohort’). It was important that this study would strive at all times to give voice to the members of the research cohort. In this respect, the study set out to use a primary research method called focused conversation. This is a method where those who participate in the research end up being the co-authors of the data.

The design of this study is one that sits comfortably within the critical research paradigm, inclusive of shades of a critical feminist approach. There is an attempt to increase the validity of this research by reducing the power differences between the

study's participants and the researcher. In line with this there is a strong desire to see the member-activists' narratives augmented by the use of personal journals and cameras to record their experiences, emotions and insights. For the development of multiple perspectives, two key officials were interviewed for this study – with their narratives inter-woven among those of the research cohort.

Chapter 5

GETTING STARTED: IMPLEMENTATION OF RESEARCH

(Working with the SFWU and Establishing the Research Cohort)

“Kia kaha, kia maia, kia manawanui”

“Be strong, remain steadfast and keep heart”

*Māori proverb supplied by
research cohort member, Matariki*

Introduction

This chapter deals with the process of taking the first tentative steps to instigate this research study. With a reasonable degree of clarity in my mind about the design of this study, I outline how I went about making contact with the SFWU in an attempt to establish the group of member-activists who would make up the research cohort and go on to be the central feature of the project. This process involved making initial contact with John Ryall, national secretary of the SFWU. John was enthusiastic about the project and he facilitated contact with another key official, Wellington-based educator Jody Anderson, for me to work with to establish a group of member-activists for the study. Getting to the point where we were able to get a potential research group together took some months due to the work demands of all concerned, including the SFWU being involved in a long period of intense campaign activity around the procurement of a Multi-Employer Collective Agreement (MECA) in the public hospital sector. Five months after the initial contact with John Ryall, the research cohort of six member-activists had been established. The group was made up of five women and one male. Four of the activists were working in the aged care sector. The ethics process for this study involved submitting a low risk notification document for approval based on the

anonymity of the research cohort¹². Other participants in the study, namely officials from the SFWU and other unions provided written consent for their names and identities to be used.

This chapter also introduces the six SFWU member-activists who make up the research cohort. For this section I have used the information that they provided through the completion of a participant profile sheet. What is revealed is the participants' rich and varied involvement with their Union, other unions and often their very active roles outside of their Union in the community. This section is designed to introduce the cohort to the reader. It provides some degree of depth and knowledge about each participant, brings to life off the page each member-activist and gives them a personality that can be carried through the rest of this thesis to its conclusion.

Making contact with the SFWU

In early May 2007 I started an email conversation with Wellington-based John Ryall¹³, National Secretary of the SFWU, about the potential of working with a group of delegates and activists from his Union on a research project that looked at ERE. My own Union, the EPMU, had a good relationship with the SFWU, working collaboratively in industries around the country like food manufacturing where we shared membership within many companies. John was keen on the idea of a research project involving SFWU activists. Due to our busy work schedules at this time¹⁴ we did not get to have a face to face meeting until mid-June 2007. John valued the role union education played within the SFWU. He was interested in the concept of what is referred to in union circles as 'follow-up'. This is a formative assessment activity involving working with members following their attendance at

¹² For details of the ethics approval process see page 52 of this chapter.

¹³ John provided his written permission to use his name in this research project (see ethics section, page 52, of this chapter).

¹⁴ John was heavily involved with the hospitals' MECA campaign at this time. This involved a constant round of meetings with members, officials and employers, together with court actions and threats of being locked out. "I have been living and breathing this MECA dispute. We are back in negotiations tomorrow and maybe Saturday." (Email to author 1 June 2007).

union education workshops¹⁵. John and I discussed my research ideas when we eventually met in downtown Wellington. At that stage, I had an emerging research topic to discuss with John that focused on the impact of union education. I made it clear that I wanted this to be a collaborative research project, acknowledging I was a union activist first and foremost wanting to research with and not *on*, a group of union activists. I explained at this meeting my reasons for wanting to use the research method of focused conversation. I said it would be likely I would want to interview John and other officials as part of the project.

In thinking about working with the SFWU, I was aware of the cultural constructions that informed my status as a pakeha male with deep middle-class roots. I saw the SFWU as a staunchly working class organisation, with high numbers of women, Maori and Pasikifa making up the membership. However, my research would be focused on union education. The challenge would be how I took account of, and navigated through, any cultural and social complexities that would undoubtedly be present with the aim of producing a body of research that would, in the end, be valid and useful to the SFWU and the broader union community.

John suggested that the other key SFWU official I needed to work with was Jody Anderson¹⁶, the Union's Wellington-based educator. Meeting Jody had its own challenges. She worked only two days a week and there was an on-going issue of trying to line up our diaries so that we would both be in town on the same day so we could meet or at least talk by phone. I finally got to meet Jody at the SFWU's national office in Petone at the beginning of July. I outlined for her my plans for doing a collaborative project involving SFWU member-activists on a theme around looking at the impacts of ERE. I discussed with her the concept of using the method of focused conversation and why I thought it would be appropriate. I explained my

¹⁵ The NZCTU Organising Centre was active at the time in promoting among its affiliates, including the SFWU, an initiative called the 'Follow-Up Project', designed to enhance the effectiveness of union education outcomes by ensuring union organisers and educators worked with member-activists following their attendance at union education workshops.

¹⁶ Jody provided written permission to use her name in this research project (see ethics section, page 52, in this chapter).

thinking behind the two criteria that I wanted considered by the SFWU when constructing the research cohort, these being the issues of gender balance and a history of participating in ERE workshops. Following that meeting, Jody began work on assembling a list of delegates and activists that could potentially make up the research cohort.

Establishing a research cohort of member-activists

Over a period of weeks I had regular email and phone contact with Jody and we worked to construct a letter that would be sent out to the delegates identified by Jody as potential members of a research cohort (see Appendix 3). The final letter sent out by Jody to delegates in late September 2007 varied little from the original draft. It informed the SFWU member-activists that they were invited to attend an initial pre-research meeting that would take place on October 24, 2007 (see Appendix 4).

Early on it became evident that it was going to be difficult to satisfy the gender balance request for the research cohort even though Jody had set out to try and achieve this. In terms of the SFWU's membership and delegate demographic, males were very much in the minority among the Union's activist base. By the meeting of October 24 Jody had only been able to identify one male in the Wellington region who would participate.

One of the ideas I had explored with Jody for the research project was to use EREL for the running of the research sessions. This would enable the SFWU to get the research cohort off the job on pay during working hours. At this stage of the research project I was concerned that I would have difficulties getting a 'critical mass' of member-activists together. To be able to use EREL I would need to develop a new programme and get it approved through the Ministerial Advisory Committee. I discussed the concept of doing such a programme with a senior DOL official who thought it was a good idea. Jody believed it would be worthwhile

raising this idea with the group of member-activists she was assembling for the meeting on October 24.

The pre-research meeting at SFWU Office (October 24, 2007)

The first meeting of the potential members of the research cohort took place as planned on October 24 at the SFWU office in Petone. Of the ten delegates John Ryall and Jody Anderson had contacted and confirmed to attend the meeting, eight turned up on the night.¹⁷ In the lead up to the meeting, I had discussed with John and Jody about providing some food given that we would be holding the meeting in the early evening around dinner time. I thought that sharing a meal would be a good way to introduce myself to the group. John and Jody agreed and we settled on a menu for the evening. I prepared a chicken curry, rice and buns. Jody did salads and a whole chicken. The food was a big hit with all those present. At the meeting the member-activists unanimously declared they liked the idea of starting future research meetings with food.

Appropriately, John welcomed all those present to the meeting, inviting everyone to eat and relax. While we all ate, I opened the discussion up by going over what I saw as the aims of the meeting. I had prepared a short briefing paper that provided details about myself and the project (see Appendix 2). I talked to this during the meeting and added more detail about myself and the project in response to questions from the group. I explained that I wished to tape record our conversations. Thereafter I would transcribe them and return the transcript to the group for them to review, analyse and to make further comments if they wished. This, I explained, was how I would see putting into practice the highly collaborative method of focused conversation that I wanted to use in the study. I said the method would be somewhat experimental, but the aim was to have them

¹⁷ Of these eight delegates and activists, five would go on to participate in the group research meetings [Tractor, Matariki, 99, Wikitoria and Lyn]. One more delegate, Polly, joined the group for the first group research meeting on the November 7 meeting. This would mean there were six delegates actively involved in the research cohort.

significantly involved in the production of the ‘data’ that would emerge from this project.

At this meeting the member activists present made comments about their union experiences to date. Vi¹⁸ said how she “loved coming to union seminars.” Tractor¹⁹ said he “liked to learn”. ‘Wikitoria²⁰ wanted to learn more and “get some more experience.” 99²¹ said how she saw union education as being very “empowering”. Matariki²² agreed, adding “knowledge is power”.

I told the member-activists gathered for this meeting that I envisioned that we would need to have about four research meetings, lasting 60 to 90 minutes each, in order to gather the data required for the project. I based this number of meetings in relation to the experiences of Clough and Nutbrown (2002) and their use of the focused conversation research method. Consequently, all but one of the member-activists said they were happy to be involved with the research project and were keen to participate and attend the meetings. The member-activist who declined to participate gave no particular reason. We confirmed that the first full research meeting would take place on the evening of November 7 at the SFWU Office. There was unanimous agreement that early on Wednesday evenings would be the appropriate day and time to hold the research gathering in light of everyone’s work and family commitments.

A non-EREL project

I was keen to ensure that there would be a high level of participation throughout the duration of the research project. To this end I floated the concept of using a new ERE approved programme, enabling paid leave, as one way of negotiating a potential barrier to attendance. All the member-activists thought that it would be a waste of energy and time pursuing the idea of getting a new ERE approved

¹⁸ Assumed name

¹⁹ Assumed name

²⁰ Assumed name

²¹ Assumed name

²² Assumed name

programme up and running for the project. Primarily they felt that EREL was in short supply on their jobs²³ and, besides, they would be happy to meet early evening in their own time so long as the meeting days were arranged far enough in advance. In pointing to our first research gathering the following month, the research cohort asked if I could provide a question for them to think about to get them started. To this end I wrote to them about a week later providing them with a question for their consideration (see Appendix 5). I was asking them to think about what changes they thought had occurred that could be linked with their involvement with ERE courses facilitated by the SFWU. A detailed outline of the member-activists' attendance at the ERE courses facilitated by the SFWU is attached as Appendix 9.

In the end six SFWU member activists were present for the first research meeting on November 7. One activist, Vi, gave her apology for not attending because she was required to work that evening. Prior to the second meeting in December Vi notified me that even though she would like to be involved in the study, work commitments would prevent her from doing so. Just prior to the meeting on November 7, another activist, Loto²⁴, contacted Jody Anderson and told her she had reconsidered her participation in the project. Loto was the only Pasifika member activist who attended our meeting on October 24. She was a committed union activist who lived in central Wellington – some 15 kilometres from Petone - and was working shifts as a hospital cleaner. With her work and family commitments, she felt the travel to Petone for the research meetings was going to be too difficult for her to manage.

²³ Section 74 of the ERA 2000 provides a formula for the calculation of how much EREL unions can allocate annually. For employers with between 5 and 50 union members, the very large majority of SFWU sites, the Union is entitled to use a maximum of five (5) days leave per annum. On such sites it is not uncommon to have multiple delegates, requiring this leave entitlement to be rationed by the union.

²⁴ Assumed name.

Gaining ethics approval from Massey University

At all stages of this study I kept my supervisor from Massey University fully informed about what I was doing and if I saw any ethical issues arising as result of this process. In May 2007, in line with the University's ethics approval process, I completed the initial screening questionnaire that would determine the approval procedure that I would ultimately use. At this stage I envisioned working with one key stakeholder group – those who would eventually be referred to in this study as the research cohort. I wanted to keep the identities of cohort members anonymous. I anticipated using other publically available information to augment and supplement the results of my work with the research cohort. As a result, I answered No to all questions in the aforementioned screening questionnaire. After consultation with my supervisor, I proceeded to develop and submit a Low Risk Notification document for ethical approval.

When I began the research meetings, and carried out interviews with SFWU officials John Ryall and Jody Anderson, I found that it would be very difficult to maintain anonymity in relation to their identities. I was going to be making it clear that this study involved working with the SFWU in Wellington, and the prominent roles played by John and Jody in the Union would make them easily identifiable. They had indicated orally during the interview I did with them that they would be happy to be named in this thesis. As well, George Koletsis, from the Australian Manufacturing Workers' Union (AMWU), had verbally consented to being named. Acting on the advice of my supervisor, I sought the written consent, in the form of emails, from John, Jody and George to be identified in this thesis. These consents were obtained on July 28 (Jody), October 23 (George), and October 28 (John).

When it came to using the photographs, the set provided by Matariki clearly identified herself, grandchild (mokopuna), partner and fellow Māori trade unionists who had attended various hui with Matariki. Initially, I blacked out the eyes of all those appearing in the photographs so as to mask their identities. The issue of identification was raised with my supervisor and with Matariki. Matariki said she

was not happy with the blacking out of the eyes as this denigrated the subjects as people. I agreed. After a series of email and letter exchanges, Matariki and her partner affirmed they were happy to have her photographs used. I did not use the group photographs provided by Matariki as these openly identified various people who had not given consent to be identified.

Introducing the Research Cohort

The research cohort profiles

To assist with presenting a profile of the member-activists participating in this study I developed a two page sheet titled, 'Research Profile' (see appendix 7). I had discussed developing such a sheet with the research cohort during our series of meetings. The information provided in the completed sheets would be used in developing a participant profile to be included in this thesis. I sent a blank copy of the sheet to the cohort in early April 2008 and asked them to complete it and return it to me. Five of the six participants returned the sheet by the end of the month, the last one was returned in early June 2008.

In writing up these profiles, I used the details provided by the participant along with some quotes where I thought this was appropriate. In the case of Matariki's profile, I used nearly all her words as she had written them. When I had the got the profiles to the stage where I thought they represented what each participant had written, I sent this draft to them for them to review and make any final changes that they thought necessary. I wanted to make sure they were comfortable with what I had written and that this provided a true representation of who they were, their education and employment history and their involvement with the union movement. Most of the cohort members were happy with what had been written with two suggesting minor, grammatical changes.

Polly

Polly is a European woman, in her mid-40s. She left school in her seventh form, had a couple of years at a polytechnic but did not gain any formal qualifications. She has worked for 18 years as a proud mother to her two children. In the paid workforce she has previously been an offset printer and darkroom technician for 10 years, and caregiver for seven years. Polly has been working for the last seven years with a large Wellington employer in the rest home industry. For the last five years she has been an activities officer. In her time in the paid workforce Polly has belonged to two unions, the Public Service Association (PSA) and SFWU. She has been with the SFWU for the last five years, being a delegate for four of these.

In terms of ERE workshops, Polly has attended the SFWU's 'Organising in the Workplace' and 'Be Active' workshops. She also attended the NZ Council of Trade Unions' 'Advanced Delegates' workshop. As for non-ERE workshops, but recorded as training events by the SFWU, Polly was a delegate to her Union's National Women's' Conference in 2007. Also that year she was on the Union's 'Building our Power – Union Women in Action' course.

Matariki

Matariki is Ngati Raukawa and in her mid-50s. "I was the first in my whanau to complete 5 years at secondary school and to gain school certificate." In the early 1990s she did a social studies certificate at Victoria University and in 2001 graduated with a Diploma in Māori Management from Te Waananga-o-Raukawa. "I was the first in our Whanau to gain a tertiary qualification. I would not have been able to complete these without the full support of my Whanau. The highlight for me whilst studying at Te Waananga-o-Raukawa was to graduate with my Mum who also studied in the same year! Together, we both gained a lot more knowledge, understanding and confidence in te reo Māori and tikanga, iwi and hapu histories".

After leaving school, Matariki's working life started out in close proximity to her mother. "I worked with my Mum briefly at a local jeans factory but when she saw the BNZ in Petone advertising for an office worker she insisted I apply. My first job was as a secretary to the bank manager (a cantankerous, impatient boss!) but I later became the head teller. I left after 4 years. My other jobs have involved service to others and community development. For example, Accounts Clerk, Petone Borough Council; Receptionist & Community Worker, Hutt Union & Community Health Service (HUCHS); Community House Co-ordinator, Alicetown Community Centre; Strategic Māori health leader, Regional Public Health; Project Manager, Whai Oranga o te Iwi Health Centre – a new health service for low income families in Wainuiomata; Project Co-ordinator, Pomare Union Health Service and a PHO Co-ordinator."

"All of my siblings found occupations in freezing works or factories when Petone was heaving with industrial jobs. After the birth of our first son in 1988, I got involved in our local community (e.g., Plunket, Mothers Support group, HUCHS etc.) and never looked back on fulltime work again! I've chosen to work part-time because it gives me more time to be active in my union and whanau activities and to share my skills and knowledge with others."

For the last eleven months, Matariki has been working as a coordinator for a Primary Health Organisation (PHO) in the Hutt Valley catering largely to meet the needs of Māori and low income families. "PHOs were formed in response to (the Labour government's) Primary Health Care Strategy to encourage health services to work closer together. Members of (my PHO) have always worked collaboratively to provide affordable health and social services to low income families in the Hutt Valley." In 2002, Matariki was a founding member of the governance board that led to the establishment of the PHO.

In her work, Matariki is involved with facilitating the planning of new health services, negotiating and liaising with funders (e.g., District Health Board, Ministry

of Health), maintaining funding contracts, promoting the PHO and strengthening relationships with primary and secondary health providers, and community groups.

Matariki has belonged to the Local Body Officers' Union, Bank Officers' Union and the Wellington Hotel and Hospital Workers' Union (a forerunner to the SFWU Nga Ringa Tota). Her links with the SFWU (and its predecessor union) go back 19 years. "My union experience has given me the opportunity to hone many new skills. For example facilitating groups, conflict resolution, political lobbying, planning and leading union conferences, building new union relationships." Today Matariki holds a wide range of elected and appointed positions in her Union, including being the National Māori Convenor (since 2003), SFWU Rep on the NZCTU Runanga (since 2002) and National Vice President (since 2004). Most recently she was on the national steering group convened to shepherd through a planned amalgamation of the SFWU, National Distribution Union and Unite.

Wikitoria

Wikitoria is a Māori woman in her late thirties. She had four years at secondary school, and left to pursue various jobs, including being a checkout worker in a supermarket, a salesperson in a clothing store and working in a clothing factory.

Since 2002, Wikitoria has been a community service worker with a large national organisation. She assists people with intellectual disabilities and is involved with supporting them in their interactions with the community, "while educating the community to accept them."

Wikitoria's association with unions started before the ECA when union membership was compulsory. She remembers her time with the Clothing Workers' Union and "found they had no contact with workers" so the workers had little knowledge about their Union. "When (our) company went bust the Union encouraged (us) to sign up on the unemployment benefit. I became anti-union." Later, while working at an aged care site where she was a non-member she

observed the SFWU and thought the Union was “pro-active”. When Wikitoria moved to a new ‘greenfields’²⁵ aged care employer in the late 1990s she joined the SFWU.

Apart from her current delegate status, Wikitoria has held a variety of roles in the SFWU including being a member-organiser, Women’s’ Representative on Regional Executive, National Executive member and carried out facilitation roles at SFWU national and regional seminars for women. She has also been involved with making submissions to parliamentary select committees. Outside of her Union, she is active in women’s sport and administration:

“I have used my variety of SFWU roles to be pro-active with my personal passion for women’s rugby in the region – an area where women have historically played only netball and hockey. For me to get a women’s team up and running I needed to promote (the idea) by using flyers, the media and approaching a rugby club coach and manager. Educating myself about the process and structure of getting a team going – (requiring) working in partnership with a male dominated sport – has been challenging and rewarding.”

Tractor

Tractor is a European male in his late fifties. He left high school with school certificate. As a young man he had a strong interest in being a motor mechanic and did technical training in this field. He worked as a mechanic in the NZ Army, for the International Harvester Company and the Todd Motors assembly plant in Petone. He also had time as a warranty claims assessor with the NZ Motor Corporation. In terms of formal qualifications, Tractor holds a variety of training certificates relating to his time as a mechanic and office worker.

²⁵ A greenfields site is one where the Union has had no prior involvement and there are no union members – often these types of employers are new companies. Prior to the Employment Contracts Act, the greenfields situation was extremely rare. This is because the national award system, in place up to 1991, had a blanket coverage clause capturing all existing and new employers along with their staff i.e., compulsory coverage under the Award along with, in most cases, compulsory union membership.

In the early 1980s Tractor 'left the tools' and started work as a clerk for the New Zealand Railways' Cook Strait ferry service, where he stayed for 12 years. Following that he was a night-shift taxi driver in Wellington for another 12 years. Since 2004 he has been working as a static guard for a multi-national security company.

Tractor has always believed in unions and has been a member of the New Zealand Railways Officers' Institute, New Zealand Drivers' Union, Clerical Workers' Union and for the last four years, the SFWU. He has been a delegate for about 12 months with his current employer and enjoys the challenges presented by the role. True to his union principles and the need to grow his Union he is "always active in trying to recruit new members". In 2008 he was expecting to be a regional representative in the SFWU's national collective agreement negotiations with his employer.

99

In her late forties, 99's highest secondary school qualification was sixth form certificate. On leaving school she worked in a retail worker for a year before starting as a hospital assistant in a private surgical and geriatric hospital. She trained to be an enrolled nurse at Wellington Hospital, and on gaining her qualification she worked for five years in the hospital's geriatric ward.

Apart from her nursing career, 99 has been a childcare worker for two years, done six years of hand knitting of garments for exporting and owned her own retail business for five years. For the last 10 years she has been working as a care-giver and shift coordinator for a Wellington-based rest-home and hospital. She holds dual membership of the SFWU and the New Zealand Nurses' Organisation. Her union roles include having been a member-educator, health sector and women's representative on the SFWU's regional executive and women's convenor.

Lyn

Lyn is in her early 30s and describes herself as a European. She is the youngest member of the research cohort. Lyn's highest qualification on leaving secondary school was achieving School Certificate English. Her highest post-school qualification has been the National Certificate in Support of the Older Person, a Level 3 qualification on the National Qualifications Framework.

Since leaving school Lyn has had a stint as an adult student and held a variety of jobs including being a sales assistant and a caregiver. She has four children. For the last four years Lyn has been working as a registered caregiver for a Wellington-based private rest-home and hospital. Since working at the rest-home she has been a member of the SFWU. Prior to joining the SFWU she had never belonged to any other union. Lyn was elected by her fellow members to represent them as a delegate about 18 months ago.

Conclusion

This chapter traces the process of initiating this study from early contact with key SFWU officials, through to the establishment of a research cohort made up of six member-activists from the Union. From the beginning, the national secretary of the SFWU was an enthusiastic supporter of this study. He had a keen interest in trade union education and from his perspective as the leader of the SFWU, he was keen to see a study happen that would look at the effectiveness of his Union's ERE programmes. The process of establishing the research cohort was greatly assisted by the Union's part-time educator who played a key role in identifying and contacting the member-activists who could potentially be involved in the study. The initial meeting of these member-activists showed a high degree of interest to be involved. In the end, a group of six member-activists confirmed their involvement in the study and attended the first research meeting in early November 2007. They had rejected the idea of using EREL for the study on the basis that this leave was in short supply and they wanted to preserve it for their general union education. With the clear idea of the research design, ethics approval for the study was sought using

the Low Risk Notification process. This was based on the anonymity of the members-activists being maintained. The union officials involved in the study all gave their written consent for their real identities to be revealed. The research cohort profiles of the five women and one male member-activists involved in this study reveal a wide range of experience in terms of their union backgrounds and activism, family and community involvement and participation in ERE programmes facilitated by the SFWU.

Chapter 6

THE RESEARCH MEETINGS AND ‘DATA’ GATHERING

‘Empowerment = Rangatiratanga’

From research meeting, December 5, 2007

Introduction

This chapter details the establishment and facilitation of the research meetings that took place with this study, together with the other data gathering techniques used besides group meetings. Four research meetings involving the six SFWU member-activists took place at the Petone office of the Union between November 2007 and February 2008. The meeting mechanics are revealed, covering all relevant detail in relation to what happened on each occasion. This includes the final confirmation of who would be participating in the project, the provision of food prior to starting the research meetings, recording techniques and problems, and salient issues arising out of the meetings. Two events which impacted on the direction taken by the study are outlined. One involves the attendance of a guest Australian union official to the third research meeting. The second event covers the conference on Evaluating Workplace Learning, held at Te Papa in Wellington in March 2008. This conference became the focus of the last research meeting where the cohort members were asked to contribute to the production of a research poster. The chapter finishes with an overview of the interview conducted with John Ryall and Jody Anderson early in April 2008 and the distribution of notebooks and cameras to the member-activists in order to record their reflections on their participation in the study and their experiences as union activists.

First research meeting - Petone, November 7, 2007

As arranged, the research cohort assembled at the SFWU’s national office in Petone early in the evening of November 7. With member-activists Vi and Loto not being

present, there were five present from the pre-research meeting the previous month. A new member-activist, Polly, contacted by the SFWU after the October meeting signalled she would like to be involved with the study. I was informed of this and had sent Polly a copy of the letter and the research question (see Appendix 5) that we would be using at the November meeting. Polly was present at the November meeting so we had six member-activists in total making up the research cohort for the start of the study.

In line with the group's desire to start each research session with food I turned up for the November meeting with takeaway pizzas, garlic bread, potato crisps, juice and a salad. I had baked a chocolate cake for desert. As was to be the pattern for all subsequent meetings, we ate before starting the session.

To record the sessions I was using my five year old digital video camera with a separate digital microphone. I assured the cohort that I would only be using the audio recording function of the camera and that nobody would be filmed. I was aware that the device seemed somewhat large and cumbersome, and potentially could be a barrier or distract the participants. However, the group were happy with the recording set-up and this did not appear to be overly intrusive or have any negative impact on the flow of the sessions.

I started the first research meeting by referring the cohort to the research question that had been sent out to them earlier in the week (see Appendix 5). Most cohort members had prepared for the meeting and were keen to participate and talk in detail about what they had learned through attending ERE courses and workshops. As the meeting progressed, the cohort enthusiastically shared their learning experiences and insights, their 'tips' on how to be a more effective delegate and providing words of encouragement and support for each other. There was a strong sense the meeting was contributing to building solidarity between cohort members.

Following the meeting I set about transcribing the session. To transcribe the tape I first took the step of transferring the digital film from the recorder to my laptop computer. Then I used the audio file to transcribe from. This process was somewhat cumbersome due to the original format of the file (video), but it worked. It was however a time-consuming process, and it took nearly three weeks before I could send the transcript out to the research cohort, including Vi (see Appendix 6 for the covering letter sent to the cohort on November 26 and the transcript format used). “This’ll be like meeting the employer (and) having a minute taker. Having it checked to find out what was said” (Wikitoria, Research Meeting, November 7, 2007). At this stage, I was still nominally including Vi in the cohort and sent her a copy of the first transcript. At the conclusion of the first meeting we had agreed we would meet again on Wednesday, December 5, 2007.

At the end of this first research meeting, cohort member Matariki helped me pack up my things and do a clean-up before leaving the premises. She talked about the events of late the previous month when Police carried out covert raids under the cloak of anti-terrorism laws on various people and groups around the country, concentrating much their activity on members of the Tuhoe tribe deep in the Ureweras. Matariki was deeply concerned about the Police actions. Later that month she emailed me an article written by a prominent lawyer and Māori rights activist, Moana Jackson. It was titled ‘Back in the Mists of Fear’ and attacked the Police’s actions for the confusion, hurt and trauma that had been caused to whanau and communities.

Second research meeting – Petone, December 5, 2007

The six member-activists from November were present for our meeting on December 5. Again, Vi was unable to make the meeting due to other commitments and had given her apologies. Shortly after the December meeting, she emailed me saying she would not be participating in the study. Her family and work commitments made it too difficult to be involved. She wished us well for the project.

We started our session on December 5 with a meal which I provided. Even though I had a major issue with the recording of the session, and this is elaborated on below, I was primarily interested in doing what is called a 'butcher's paper' exercise with the group. This is a common technique used in trade union education sessions²⁶. Generally, it is a group activity, focusing on an issue or question being posed by a facilitator or workshop member. Then group members collectively set about addressing the issue or question – writing up their discussions, ideas and comments on the sheet of butcher's paper. Normally, the butcher's sheet would then be reported-back and presented to the wider workshop where there could be another layer of discussion and debate generated around it.

Given I could not record the session, I kept notes and added to these following the meeting. I saw the butcher's paper exercise as one that was about the visioning of the future, examining the present and seeing what role ERE and union education could play bridging the 'gap' between what exists today and what we want to see happen in the cohort's 'tomorrow'. I wrote up the three butcher's sheets from the session and these are set out below. I sent out a copy of these sheets to the cohort asking for their further input and comments. I made my own comments on the sheets and these take the form of text within the yellow coloured spheres. I wanted these to act as a set of prompt questions for the cohort to think about in the lead up to our next session in January.

To describe what happened at the December 5 meeting I use here an entry in my e-journal that I made immediately following the session. This is reproduced verbatim from my journal, with some minor grammatical edits and the changing of the names of participants, using the names the cohort had assumed for this project. I also

²⁶ The term 'butcher's paper' is an anachronistic one dating back to when large sheets of newsprint, as would commonly be found in butcher shops, were used for an education exercise. While rolls of newsprint can still be found in some union seminar rooms, most often these have now been replaced by large sheets of commercially prepared paper.

deleted the name of an SFWU organiser that is referred to. To distinguish this journal entry I have used italics:

“Did not start well. I left the power cord for the vid recorder at home – so I couldn't record the session. I hadn't intended to dedicate the evening [to] recording as I wanted to do some work with butcher's paper. However, it rattled me first off...and wasn't a good start.

Started with a review of the transcript from the 7th [November] which I sent out a week ago to everyone. There were not a lot of questions or comments. Wikitoria asked what were my thoughts. I responded by highlighting some of the notes I'd made on the transcript. Clearly, the EREL training had helped with developing essential skills required for communicating, problem solving, grievance handling, planning, etc. There was also some awareness raising around issues – particularly political issues.

In terms of what people actually learn through the training process, points were raised around the varying quality of facilitation/training. The role of the trainer was very important as to influencing what happens in the training room.

The other issue was organiser support for the delegate. In Tractor's experience (the security industry), his current organiser [name deleted] was doing a really good job. However, previous experiences with organisers had not been good and this detracted from the union's ability to make inroads in recruiting in the industry.

Butcher's paper exercise: In preparation for tonight's meeting I thought that I would attack things slightly differently. I wanted to find out what the group saw as the purpose of union education – in so far as its transformative function. This proved to be a very difficult exercise. They struggled with it – for various reasons.

For one participant [Matariki] she was visibly struggling with the content and the way the exercise was going.... Later, after everyone had left the room, she talked to me about her 'frustration'. That there was obviously two world views operating in the room. A Maori world view – and a non-Maori view. I think this largely grew out of the discussion describing the current situation for delegates – in terms of what was happening in their jobs, their industries, their community and their country. The group was divided on the issue of crime. Tractor did not believe that a high Maori prison population had cultural and historical roots. Matariki did. Tractor also stated that there were big issues with kids from solo parents. Polly, a solo parent, strongly disagreed. She was adamant her kids were fine and doing well and that had nothing to do with her being a solo parent.

This has exposed a major issue for me. What I would call 'varying levels of consciousness' transposed against gender and cultural issues. Is it possible for this group to produce a coherent piece of research i.e., or will it have multiple dimensions representing its constituent parts?

For the exercise, first up I wanted to get the delegates to imagine an ideal future for them, their families/whanau, their community and their country. They struggled to do this. I framed the 'vision' exercise in terms of what I saw union education standing for: Firstly there's the skill development agenda and then there's the goal to 'change the world':

From Literature review for my research proposal:

"We want labor education to strengthen class-conscious activism, to build community and solidarity, to advance equity, to develop democratic processes, and to build effective labor organisations that contribute to a wider common good." (Thomas and Martin, 2002, p239)

Not surprisingly, – Matariki's vision dealt with issues pertaining to Te Tiriti Ō Waitangi on one side of the butcher's sheet – and everything else included in the vision on the other.

Next, I wanted them to describe the present situation. This was very difficult and didn't get far. We had the issues with Tractor's stuff above. There were also comments about teenage pregnancies. Notably, Matariki's 15 year old son recently had a baby with his 16 year old partner. She did not agree that it was necessarily a 'problem' for teenagers to have babies – particularly if the issue was looked at through a different cultural lens. Straying way off the track from EREL!

Finally, I asked the group to describe the role of union education in moving from the present to their vision. How significant was the role of union education?; how much progress had we made towards reaching the vision?; what were the other factors required to be present to progress towards the vision? I drew up the page for this exercise – writing up the responses from the group.

Clearly, I was pushing the group in this exercise to think about a transformative agenda (in the context of thinking about the research question), for in order to achieve their vision their current world needed to be radically altered. This was an interesting exercise. They started to remove the 'blinkers' and talk about what was really needed with an education agenda – particularly in relation to building political and community consciousness. Their education to date, arguably, had only touched on this area and I'd say there'd been little in the way of structural analysis."

The three butcher's sheets from the second research meeting follow:

Delegates' Vision for the Future (Sheet 1)

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TE TIRITI Ō WAITANGI

Constitutional change
 Equity of health outcomes
 Equity of education
 Rangatiratanga – empowerment
 Te Reo Māori – spoken everywhere
 Tikanga Māori – āroha, āwhi, tautoko
 Whānau, hapū, iwi
 Value bicultural experiences
 Mana – Trust
 Respect
 Many languages spoken in Aotearoa

More money - Higher wages – less tax, ?No tax
 Families able to survive on one full time wage so one person can look after children
 Work less hours
 More time with family
 More employment
 Free education
 Free health system
 Compulsory health insurance – paid by employers
 More affordable, cheaper housing for families
 No pollution, fresh air
 No crime, no prisons
 More jobs (less hours worked) - work for everyone
 Fair trade – national and international
 No slave labour
 Good working areas globally
 Food for all, clean water
 Enjoy work
 Apprenticeships
 100% unionised workplaces
 No poverty

Delegates' View of Where We Are At Today (Sheet 2)

High under employment

Low Wages

High crime rate → cultural problem: - prison

Income growing divide between rich and poor

Disparity (in) incomes – housing – health

Teenage pregnancies

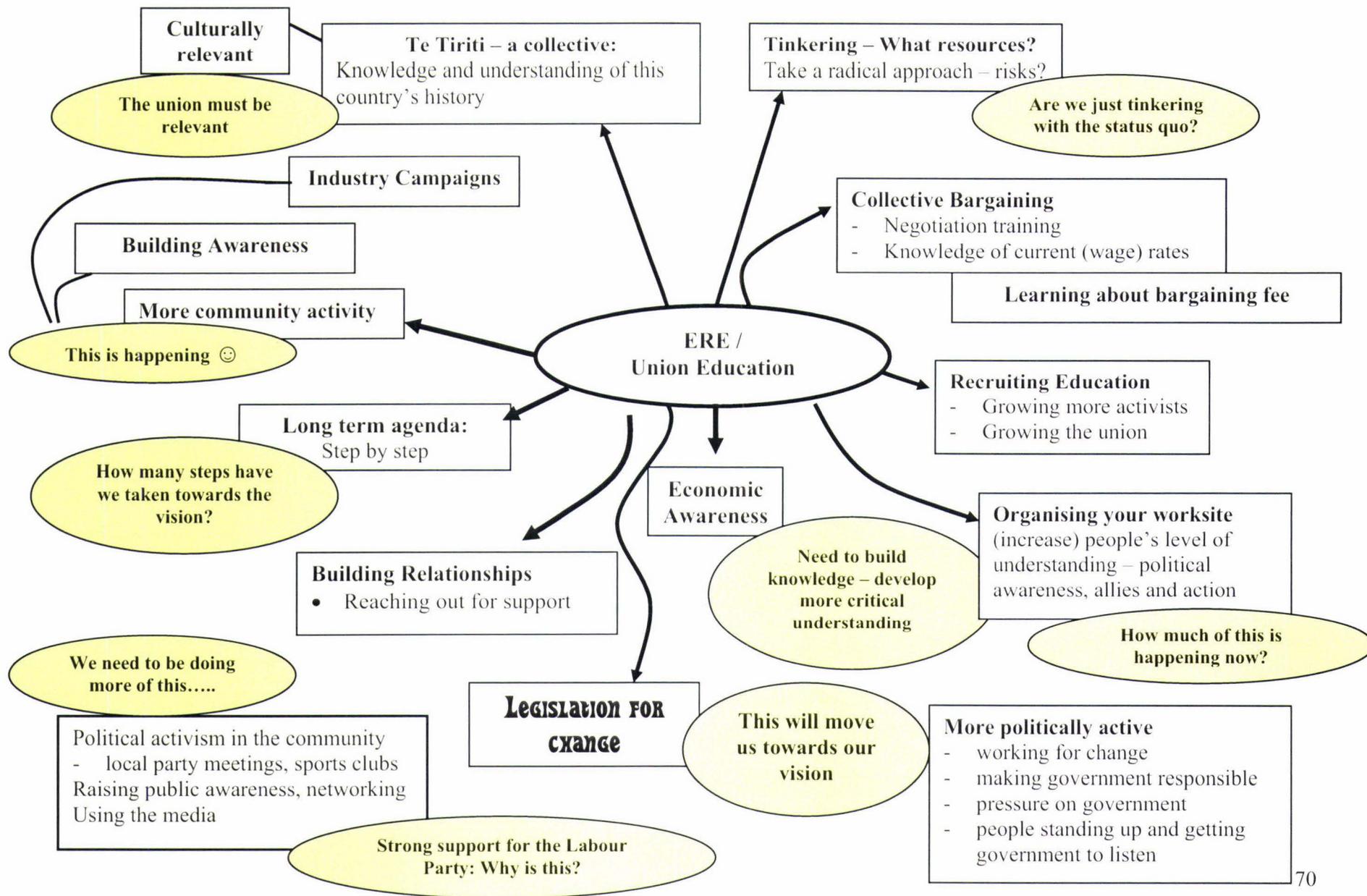
KEY

Questions and statements posed to the cohort for their consideration in the lead up to the next research meeting appear in the coloured oblong sphere(s) on this page and the next – Sheet 3.

RT Question:

“Did we get to describe the whole picture of where we think we are at today?”

Bridging the Gap (between our Tomorrow & Today) – the Role of ERE (Sheet 3)



Issues for consideration for next research meeting

Before finishing our session on December 5 we agreed that our next research meeting would take place on January 30, 2008. As well, there were two issues I wanted to raise with the cohort; the attendance of a fellow trade union educator from Australia at the next research meeting and the concept of doing a poster for the Evaluating Workplace Learning (EWL) conference due to be held in Wellington in March 2008.

I asked the cohort if they would be comfortable having George Koletsis from Australia join us for the January meeting. George was the National Education Officer with the AMWU, a sister organisation to the EPMU. He had been invited to attend the annual EPMU education planning meeting in Wellington at the end of January 2008. I told the cohort George would be interested in this research project but that he would only have the status of being an observer at the research meeting. Cohort members were comfortable with the idea of having George present and looked forward to meeting him.

I told the cohort that back in August I had talked with a colleague from the union movement who was involved with organising the EWL conference. She was linked to the Ministerial Advisory Group on ERE, who were charged with putting the conference together in association with the DOL. I felt that this study related well to the EWL conference theme and the timing would fit with the completion of the data gathering phase of the project. The colleague suggested I put together a 'poster' outlining the research project for display at the conference. At the beginning of December I contacted the Chairperson of the Advisory Committee and got their support for the poster concept. On this basis, I discussed with cohort members that I would like to make the construction of the EWL conference poster the focus of our last research meeting that would be held in February 2008. They agreed that this would be a good idea.

Third research meeting - January 30, 2008

Five cohort members were present at this meeting, with Lyn away sick. I took along to the meeting George Koletsis from the AMWU. On the way to the meeting we bought takeaway pizzas for the group's evening meal. Once at the SFWU office I introduced George to the cohort. We started the meeting by reviewing the work we had done the previous month. George made a few short comments during the session, introducing to the cohort the concept and language of social capital and community building. He did this in response to listening to one cohort member talk about her activist experiences outside of the Union, particularly in relation to being involved with developing women's rugby. Following the meeting, I talked with George about the next meeting – scheduled for February 20, and how I wanted the cohort to take ownership of developing the poster for the EWL conference. We agreed that this would best be achieved without me being present while they worked on the poster.

I wrote up the transcript from the third meeting and sent it out to the research cohort. I also informed the cohort that I saw the next meeting as our final research gathering as a group and that I wanted the session to concentrate on producing a poster for presentation at the EWL conference.

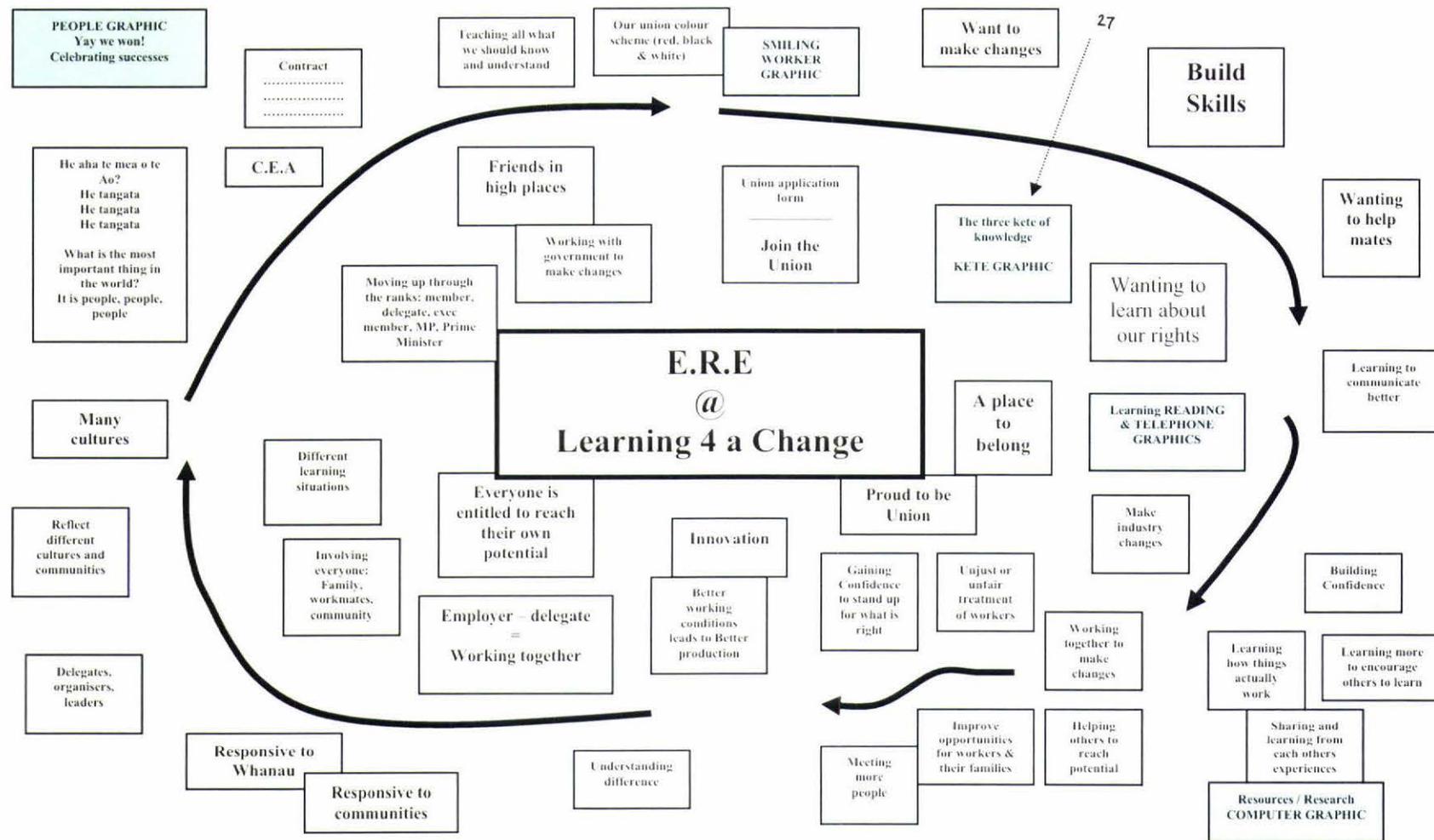
Fourth research meeting – February 20, 2008

For this meeting I arrived early at the Union office in Petone with the meal for the cohort. I had brought along the materials for the cohort to do a poster development exercise – butcher's sheets, 'Post-it' sticky notes and marker pens. When everyone had arrived we sat down and ate. I then explained to them that I wanted them to construct a poster that they would like presented to the March conference – and that this would represent, to a large degree, the work that we had done to date on looking at ERE and its impacts. I said that I did not want to be present while they worked on the poster as this may interfere in its production. This was to be their effort, their creation, without any input or influence from myself. I left them for over an hour to construct the poster. When I came back they had produced a work

with the central theme, 'ERE & Learning for a change'. 'Post-it' notes with detailed writing and some drawings covered the sheet of paper. Circular arrows flowing around the sheet indicated their view that learning happened in a spiralling flow, that it was a dynamic process, a constant building of knowledge and understanding. I wrote this poster up and it is set out below on page 74.

I had intended to use the cohort's 'poster' for the EWL conference, but shortly after the February meeting I received, from the conference organisers, the instructions for the production of posters in terms of dimensions and recommended style, including details such as font size. When applying the conference organisers' style outline to what the cohort had produced a significant issue arose regarding the design of their poster. It was clear that there would be far too much detail and it would be impossible to read the poster from the recommended distance of two to three metres. Given the time constraints, rather than attempt to re-convene the research cohort I made the decision to 'stylise' their original poster, creating a form that used very large font, colour and covering key statements and themes about the study. The new poster was laminated and is reproduced below on page 75.

Original poster produced by research cohort on February 20, 2007
for 'Evaluating Workplace Learning – Identifying Success' Conference



²⁷ Matariki provides a brief description of the Three Kete of Knowledge: 1) Ko te kete tuauri – knowledge of ritual, memory and karakia, 2) Ko te kete tuatea – knowledge to balance te kete tuauri, harmful to mankind, 3) Ko te kete aronui – knowledge to help mankind. In Te Ao Māori, the highest place of learning is called Te Whare Waananga. As learners progress they have to gather various knowledge from each kete. This collective experience will give them essential tools to not only further their learning but also to survive.

Why this research?

Methodology:

"While trade union education is a major field of practice, it is almost invisible in the professional literature of adult education."

D'Arcy Martin (1994), *Learning from the South*

EMPLOYMENT RELATIONS EDUCATION



LEARNING FOR A CHANGE



As a committed trade unionist and educator, this research project is aligned with the broad aims of the union movement – the building of a democratic, just, fair and equitable society. My methodological approach is located within a critical ethnographic framework, with this research striving to be "persuasive, purposive, positional and political."
(Clough and Nutbrown, 2002)

Methods:

"It is the narratives of the powerful that are typically captured in the documented histories and public accounts. However, the hidden stories and the competing narratives of the less powerful also require research and analysis."

Paul Smith (2005), *Stories from the Frontline*

A Masters research project looking for the transformational impacts of Employment Relations Education with a group of Service and Food Workers' Union delegates working in the service and healthcare sectors.



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A range of methods are being used – including document analysis, in depth interviews and focused conversation where "those who are the data, are those who gather the data, remould and reshape the data, analyse those data, draft and redraft the words which result until the paper is written...and has – in the process – become research".
(Clough and Nutbrown, 2002)

Interview with John Ryall and Jody Anderson – April 9, 2008.

In early April, I arranged to meet both John Ryall and Jody Anderson together. It was going to be easier to interview them together as work commitments meant it would be extremely difficult to get a mutually agreeable date and time. I used the same recording routine as I had done with the research cohort. I transcribed this interview and returned it to John and Jody for their review, and further input.

Distribution of Notebooks and Cameras

In February 2008 all six participants were sent out a small (A6) notebook and asked to record their reflections, feelings and insights following their participation in this research study. They could write as much or as little as they liked. I deliberately held back sending out disposable cameras until I had seen they had completed the journals. This was because I did not want to overload them with tasks. The cameras were sent out to all the participants in May with an attached letter (see Appendix 8). In the end, three of the six participants used the cameras and their photographs are reproduced in the next chapter.

Conclusion

In this chapter I have outlined the key research activities undertaken with this study – being the four research meetings with the SFWU research cohort, the interviews with senior SFWU officials John Ryall and Jody Anderson, and the distribution of journals and cameras to the cohort. The first research meeting involving the research cohort had its tentative beginnings, with two member-activists who had earlier indicated they would be involved not turning up. However, a new activist came along ensuring there were six members of the cohort for the duration of the study. This first meeting provided the opportunity to build the bonds of solidarity and trust between research and member-activist, with sharing a meal playing an important role in this respect. The second meeting was a case of equipment failure (tape recorder), coupled with a planned attempt to do a creative brainstorming session with the cohort in creating a vision of their future, including the role that can be played by ERE in achieving this vision. This exercise used ‘butcher’s sheets’

to record the session and these are reproduced in the chapter. In line with the desire to take a reflexive and self-critical approach to this study, I use a verbatim journal entry to record my thoughts immediately prior to the meeting.

For future meetings I sought the agreement of the research cohort to have an Australian trade union official present (for the third meeting) and to use the last meeting (February 20) of the cohort to work on developing a poster for the government-sponsored EWL conference which was to be held in March 2008. The cohort's original poster was written up and is included in this chapter. Style issues, specifically font size and content detail, prevented the use of the cohort's original poster for the conference and instead I prepared a stylised version. The chapter is drawn to a close with an outline of the research meeting held with senior SFWU officials and the distribution of disposable cameras and journals to the research cohort to record their experiences as union activists and their involvement in the study.

Chapter 7

RESULTS FROM THE STUDY

“(You) quite often go away from education (sessions) or meetings....very empowered and charged up, wanting to get out there and do things.”

Research cohort member, 99

Introduction

The first part of this chapter (Section A) involves the presentation of five broad emerging themes from the four research meetings that were held involving the research cohort. These themes show that there is a strong link between what cohort members learn through participating in ERE workshops and courses and what in turn happens at work and in their communities. For the themes section I use extensive tracts of direct quotes by cohort members to bring their narratives to the forefront. The second section (B) deals with the cohort members' personal journals and photographs. Each cohort member was asked to write a journal recording their experience with being involved in this study. Three member-activists used a camera as well to capture on film their experiences and feelings about union education and life as a union activist. The use of journals and cameras was an attempt at triangulation in terms of expanding and enriching the data gathering process. As well, these contributions helped ensure the cohort members' voices were amplified and provided them the opportunity to represent their social world. The third section of this chapter (C) relates to the views on ERE of the two SFWU officials who participated in this project; national secretary John Ryall and Wellington-based education organiser, Jody Anderson. Their perspectives and understandings provide another dimension to this study, one that can be seen to compliment and reinforce the contribution made by the cohort members.

Section A: Emerging Themes from the Research Meetings

Five broad themes have been distilled from the four research meetings held between the beginning of November 2007 and the end of February 2008. These are:

- 1) Making Connections
- 2) Building Confidence
- 3) Active Citizenship
- 4) Learning by Doing
- 5) Skills, Knowledge and Understanding

These themes are elaborated on below:

Theme 1: Making Connections

Membership turnover and maintaining density are critical issues for the SFWU. Declining membership impacts on the Union's power and influence. In Tractor's industry for example, security, union membership is low. He was initially inactive as a member but was asked by a departing delegate to step up to a representative role. As a new delegate he quickly learned the importance of recruiting. "We needed to have a recruitment drive to give us more power at the bargaining table". He now believes that more members should take on the delegate role "as it gives you an insight as to what is going on". For Tractor, ERE has been important in developing a deeper understanding and awareness of what his Union does. He makes the connection between low wages and low union density in his industry. His hourly rate is barely above the legal minimum wage. Tractor says building union density creates a stronger bargaining position going into negotiations for a new collective agreement:

"(People) say, 'why should we be in the union when we're only on that pay?' And I say the union goes into battle and tries to get for us better wages and if you joined the union you'd make us stronger and then we'd

have a better chance of getting a better wage.”

Tractor

The SFWU has a policy of using delegates for recruitment campaigns. The Union will sometimes negotiate with employers to have the delegates on a period of unpaid leave, with their wages paid by the SFWU. Cohort members believe non-members, being fellow workers, are more receptive to joining the union when talking with them rather than paid union officials. The cohort’s education has helped make them more effective recruiters. Polly has been very successful as a recruiter in the aged care sector.

“(Potential members) relate to us better than organisers and you end up getting more people signing up.”

Polly

Some of the delegates explained that as they developed their skills and understanding through their union education and their on-the-job experience, their ability to work with their employer improved. This has been the case with Polly:

“I think it’s easier for the boss to be able to deal with one person that also knows a lot of what’s going on rather than having all sorts of people coming in all the time talking to her.”

Polly

The goal of ‘more productive relationships’ with the employer takes on various practical forms for cohort members. For example, it can be about being involved in working parties on employment matters, regularly sharing confidential information on key workplace issues, or being asked by senior managers for their opinions and input to help run the operation:

“We are meeting all the time now with head office. We’re called over and they tell us things first and sometimes (it is) before the managers are told. Because you are in the union ...they want to keep you on their good side.”

Polly

For 99, improving access for workers to skill development and qualifications will boost productivity in her sector. She has been extensively involved as a union advocate in skill development and reviews in the Aged Care sector. Some of the cohort members have a deep sense of satisfaction that their employers respect their position as elected representatives, recognising the authority the position carries.

“Our manager’s asking me questions and he doesn’t say anything union-wise while I’m in the room, or discuss anything he shouldn’t be discussing while I’m there. So it makes you feel good when they’re asking you questions. It’s like, ‘Oh yeah, I’ll get back to you.’”

Wikitoria

The productivity issue and workplace relationships are picked up by Matariki when she talks enthusiastically about the HANGI project²⁸ and the efforts to improve workplace productivity and skill development for Māori. This programme was trialled at Sealords and Heinz Watties – two employers with high SFWU memberships and large numbers of Māori workers.

“(If) you can get those relationships right, it’s going to cause less factions within your workplace so would increase your productivity because of more happy workers and a more harmonious workplace.”

Matariki

²⁸ HANGI or ‘Helping Advance Nga Mahi in Growth and Innovation’ is a NZCTU project representing an initiative coming out of the 2005 Hui Taumata conference on Māori economic development, focusing on workplace productivity, education and training for Māori workers (Source: The Unionist, Issue 36, March 2006).

As delegates gain more experience on the job and attend more education workshops, they start to develop a much deeper understanding of what could be described as the ‘political economy’ of their workplaces and industries. This understanding can be well advanced of what their fellow union members know and understand about their Union:

“I think sometimes there’s a lot that goes on that members, and no doubt (delegates), don’t see. You know, like political activity and things like that. Just making MPs aware of what happens in our sectors...and members saying, ‘Well, what’s the union doing?’ The union’s doing that, the union’s trying to raise our profile and things like that. (Our) industry, the aged care industry, survives on (government) funding. And the funding is getting to employers but it’s not getting to the employees, or a very minimal amount of it is. A lot of it is going into profit for the business or just into the running costs of the business or whatever. It’s not actually getting to the people who are doing the work.”

99

The funding issue for employers in the aged care sector is a key issue for the SFWU, with the government agreeing to increase funding on the basis it is linked to collective bargaining in the sector, so as to have the effect of potentially boosting wages. This has resulted in a fair degree of litigation and delay in getting collective agreements settled. At the time of carrying out the research for this study, employers were unhappy with the funding they had received, arguing it was not enough in respect to what they were being asked to do with it by the government.

The democratic union classroom has created many positive experiences for the cohort members. Coming together from a diverse range of companies, sharing their narratives and issues and making strong connections provide a rich opportunity for learning:

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“(When) we come together in groups it’s a lot better to get a story from a member or delegate than it is to get a story from an organiser about another site. It’s better hearing things first hand and talking about things first and sharing problems and how you dealt with them....People learn better from that.”

99

Also in terms of relationship building, Matariki says there has been an extensive range of ERE initiatives involving the SFWU Runanga. She sees the Runanga as a fertile place for building positive, productive relationships within her union. It is a structure that is “empowered to take up issues that affect Māori workers” with the philosophy that if Māori benefit, then everyone benefits. The SFWU Runanga often links with Runanga from other unions – particularly the National Distribution Union. Matariki has a passionate desire to see her Union making strong connections with Māori in terms of biculturalism and Te Tiriti Ō Waitangi and all that can flow from this:

“Māori want to be visible, vibrant and have a voice in our union, communities, whanau, hapu and iwi. Union is about whanau. They are part of my wider whanau.”

Matariki

Theme 2: Building Confidence

Throughout the research meetings the cohort made regular references to the impact of union education in building their confidence. Eraut and Hirst (2007) say confidence is recognised as a significant factor in an individual’s learning. Tractor had little confidence when he reluctantly took on the delegate role in his workplace. After one year in the role he had attended two ERE workshops and says he “learned a lot” from these union courses:

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“(I have) gone ahead and (helped fellow workers) by this learning period, with the union giving me confidence to do it.”

Tractor

Lyn found the union education workshops took her from “being scared” about joining up workers to her Union, to being more confident to recruit and deal with hostility towards the Union:

“We’ve got some anti-union (workers) so I found out new ways to deal with their criticisms...”

Lyn

ERE has been a vehicle for empowering and energising the cohort members, and giving them a sense of ‘voice’ through a mix of gaining new skills, knowledge and insights:

“It strengthens you knowing that you have the right to have a say. Once you’ve done your education, your planning, your organising, it kind of uplifts you. It gives you more strength and voice.”

Wikitoria

“(You) quite often go away from education (sessions) or meetings...very empowered and charged up, wanting to get out there and do things.”

99

“(Union education) gives you a bit more confidence to stand up to the boss and say, ‘Hey! That’s not right!’ I have got a right to speak and the...disciplinary meetings I’ve done since (the ERE workshops) have worked out very well.”

Polly

Learning will take place in the classroom for delegates, but what happens back in the work environment in terms of the practical application of that learning is important. It is on the job that the cohort members start to develop the confidence to apply their learning to enhance their role and effectiveness.

“(You) may have got the education but you’re still frightened to do something. But once you start rolling (at work) it comes naturally and you get the confidence. (You) learn from your mistakes. If you’re in one meeting you know you should have said ‘this’. Well, next time you say it and you kind of get more confident...I went to a disciplinary meeting the other day and it was like ‘she got me!’ And then it was like we complimented...and so it’s like, yes!”

Wikitoria

Confidence can play out in other spheres of a member-activist’s life, like Polly who says she now has the confidence to “stand up to people like the kids’ school teachers. They don’t intimidate me any more.”

Polly

Theme 3: Active Citizenship

Democracy is a word often used by the cohort members in a union, work and broader context. The SFWU has played an active role in developing people for Parliament with no less than eight MPs in the 2008 Parliament being former officials of the SFWU or its antecedents. Union campaigning activity will often have a strong political/parliamentary dimension – with SFWU officials, delegates and members regularly making submissions and attending select committee hearings. Member-activists learn in their courses about how they can engage in the parliamentary process. Recent examples have included the issue of contracting out of cleaners and the need to strengthen the provisions of the ERA to protect vulnerable workers. Having delegates and members participate directly in making appearances in front of MPs is not uncommon. Wikitoria has learned that

parliament is not an alien institution and that it can be a space where members articulate themselves in a powerful way:

“(Select Committee hearings are) a good education on how you can actually democratically make a change in legislation.”

Wikitoria

“(I) think what I felt (that) was powerful is that you don’t go into those environments on your own. The bigger the delegation the more powerful. It’s really critical.”

Matariki

Union education has opened the door for 99 to get involved in the law-making process, with her being strongly motivated by the desire to seek safety improvements in the aged care sector for staff and for clients.

“(It has) made me more politically aware and more politically active.”

99

Matariki admires 99’s efforts to effectively represent workers in her sector by ensuring that law and policy makers are made well aware of worker perspectives of what is needed in the industry:

“(If) we didn’t have our workers going around representing the interests of aged care workers how would (decision-makers) know what the real world was like?”

Matariki

Theme 4: Learning by Doing

There is strong evidence that the cohort members learn by a range of other union experiences and processes, not just through attending ERE courses, but also work

and community learning. Participation in union structures such as regional and national executives, and attending delegate conferences help build knowledge and understanding about the Union and its role:

“(Participation) has helped me understand the democratic processes which exist within the Union structures. It has built confidence around my own knowledge around governance and the difference between governance and management.”

Matariki

There is also the chance to apply skills outside of a direct union context, where things like learning how to plan, keep records and budgeting has a broad range of applications beyond the workplace:

“...I’ve used (the skills learned at courses) in my sports and I’ve used (them) at home in planning and organising my paperwork.”

Wikitoria

For Lyn, the youngest and least experienced cohort member, the experience of sharing stories with others in the group is daunting. She works for the same employer as Polly, but does not think she gets enough opportunities to test her capabilities as a delegate. “Polly needs to share... We’d like Polly to go on holiday so at least I get a chance!” Polly agrees she needs to let go the reins more and give Lyn more responsibilities in the area of working with members’ issues and grievances. “I do have to let go a little bit. But when somebody comes to you it’s just so easy to fix the problem instead of saying, ‘Well, maybe we should get Lyn to fix that problem’”. Notwithstanding this, Lyn says she has successfully represented union members in disputes at work in her short time (six months) as a delegate.

Lyn credits Polly with helping teach her how to deal with anti-union sentiment on the job or difficulties with recruiting new members:

“(I) got quite upset with all the negative things that kept coming out and (after) one of the training sessions I did here (at the union office) I went back with a poster. And we’ve got one (anti-union worker)...I just can’t stand her. So I just kept gradually putting (the poster) back when she kept taking it down.”

Lyn

Matariki affirms the efforts of Polly and Lyn to organise and represent members on their site. Her view is that it is important for union building that delegates and other activists on a job are spreading the workload and responsibilities that go with the role:

“(You) don’t have to be the sole delegate, and I don’t believe a sole delegate is capable of being everything to everybody. As long as you are building those relationships (and) are working in unison. That’s fantastic.”

Matariki

Theme 5: Skills, Knowledge and Understanding

Attending ERE workshops leads to the development and enhancement of an extensive range of skills and knowledge. A key skill that is developed is active listening. The ability to deeply listen enhances the delegates’ ability to solve problems on the job, especially in the area of improving communication between the parties.

“Quite often...the worker and the manager (are) on different wave lengths and it’s just they’re not listening to each other. (It is) a problem that’s easily solved just by one person (the delegate) being in the middle and saying, ‘But hey, that’s not actually what’s going on.’”

99

Cohort members do not always work in situations where there is a reasonable degree of trust between the employer and employees. There is evidence that union education enables them to develop techniques for dealing with such situations, particularly in respect to ensuring member-activists are able to take a more critical approach to what is being said or done by their employer. One cohort member stresses the importance of setting up a paper trail when faced with complex employment problems. Another takes the view that they should avoid taking the comments of an employer at face value if basic trust is lacking in the relationship.

“Before I had a lot of the training I would have listened to my boss more and thought that what they said was actually accurate. And now I know that a lot of it wasn’t accurate and what they wanted to do was (have me) think it was accurate. But as you know more about your rights, about what (employers) are allowed to do and what they’re not allowed to do...you actually find (what) they’re saying is wrong and that’s just what they want you to (think), but it’s not actually right.”

99

For some cohort members the concept of good faith, as outlined in the ERA, and its application to the relationship between the employer and workers are sometimes two different things. Tractor finds the issue of building trust and confidence between the parties on his job difficult, particularly in respect of an often hostile attitude of management and the low wages being paid in his industry.

Problem solving is a large part of the member-activist’s role. There are a variety of approaches highlighted for addressing a problem, including taking a Māori perspective to the issue. Matariki has found her approach has set the right tone for meetings with employers and helped control tensions in the meeting room.

“I’ve been to mediation with some of our members on a couple of occasions and just doing the simple things to set the tone and starting the

day off with a karakia if that's what our members want...(and) ending the day, regardless of whatever the resolution is at the end. (Just) taking some things into the meeting that are going to make you feel safe... whether they're taonga or special things...(is) about reclaiming some space or control..."

Matariki

Through their union education and the practical application of new found skills and learning on the job, the cohort members start to describe a range of emerging leadership qualities. For Matariki, one such example is her involvement with co-facilitating SFWU national delegate conferences:

"That's felt really huge but really enjoyable because you've kind of felt that you've been part of the team that develops a theme, and a focus, and guest speakers, workshops, that sort of thing. And so they've been huge opportunities."

Matariki

Teaching member-activists the skills and techniques of union organising is a core curriculum feature in most union education workshops. One key organising task is to build what is called a Workplace Organising Committee, or 'WOC', made up of union delegates and activists. The job of the WOC is to plan organising activities on the job and broaden the base of activism by increasing the number of people actively participating in the union. Polly learned how to set up a WOC in her workplace but found it did not work particularly well.

"(We) did try and start that (but) people were still all coming to me so that just kind of waffled on by and you just carried on doing it your way."

Polly

However, for Wikitoria workplace organising structures like WOCs are invaluable when it comes to sharing the large amount of work being done by a small number of activists like herself:

“You try and do all these things then you realise the boss is giving you all the jobs (and) everyone relies on you. It’s about empowering (members) to get involved – not just other delegates but your workers. (So) you try and give them a little task to do before you actually get involved. I found that you are doing a lot and I found that I was doing too much, and forgetting about my family and forgetting about my other commitments.”

Wikitoria

The cohort is conscious of the need to recruit members to maintain and build union density. In terms of making unions more attractive for workers to join, Matariki says they have to look outwards more, think beyond the immediate membership and be open to connecting with people in other ways. She does not think that non-union membership in a workplace – or ‘freeloading’ as it is sometimes called, should be a barrier to engagement. She uses what happens in union hui as an example of where new thinking on recruitment and organising can emerge:

“I think unions need to be a bit more bolder and braver and be unafraid of stepping into some new areas as well.”

Matariki

The member-activists use a range of techniques and approaches to recruiting and organising which they have learned in workshops and through experience on the job. Lyn has been successful when helping workers understand that even good employers move on and “you can’t guarantee you’re going to get a good boss”. What works well for Polly with her recruiting efforts is explaining to workers that the monthly cost of belonging to the union is relatively low:

“What we try and tell people is that the union cost is paid within the first couple of hours of working, especially if you are doing weekends because of the penal rates we’ve got.”

Polly

Section B: The Research Cohort’s Journals and Photographs

In February 2008 all six participants were sent out a small (A6) notebook and asked to record their reflections. I was after their thoughts, feelings and insights following their participation in this research project. They could write as much or as little as they liked. I deliberately held back sending out disposable cameras until I had seen the journals that they had done. This was because I did not want to overload them with tasks. The cameras were sent out to all the participants in May with an attached letter (see Appendix 8). The personal narratives set out below have been taken almost verbatim from the journals. Where I have done some editing it was to make only a very small number of minor grammatical changes such as spelling and punctuation. With regard to the cameras, three of the participants provided photographs to use in the project, together with captions. Again, for the most part I have used this work as they were presented. The cohort’s words and pictures provide a range of rich narratives and images that add texture and detail to the impacts of union education on their lives as workers and trade union activists. The journals and photographs follow.

PERSONAL REFLECTIONS – Matariki

(From the journal kept by Matariki)

*Nau te rourou
Naku te rourou
Kā puawai tātou*

*With your gifts / knowledge
We will all flourish together*

KAUPAPA

Research Topic

What are the transformational impacts of ERE?

OR

ERE: Learning 4 a Change?

Introduction

These are some of my reflections following participating in a union project that explores the outcomes and experiences of union education.

I hope the whakatauki (māori sayings) and te reo māori may be useful to add and enhance a māori perspective.

Āhea?

Kei hea?

When?

24.10.07
7.11.07
5.12.07
30.1.08
20.2.08

Where?

@ SFWU
Ngā Ringa Tota

Ko wai tatou?

Who?

Kaiātahia
(leader)

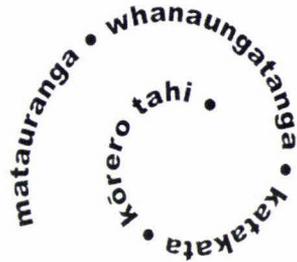
Ross

Kaiāwhina
(supporters/participants – SFWU
Ngā Ringa Tota members)

99 – Aged Care
Polly – Aged Care
Lyn – Aged Care
Wikitoria – Community Sector
Tractor – Security
Matariki – Primary health

WHY? He Aha ai?

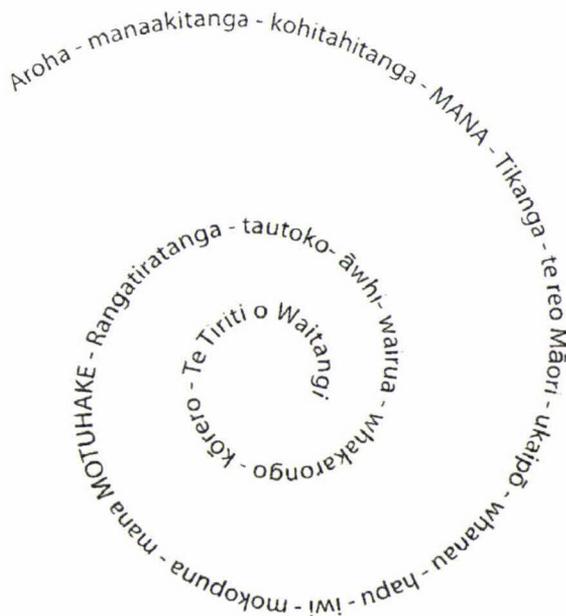
- To support study (for) thesis
- To share experiences with other union members
- To learn from others



WHAT? He Ana

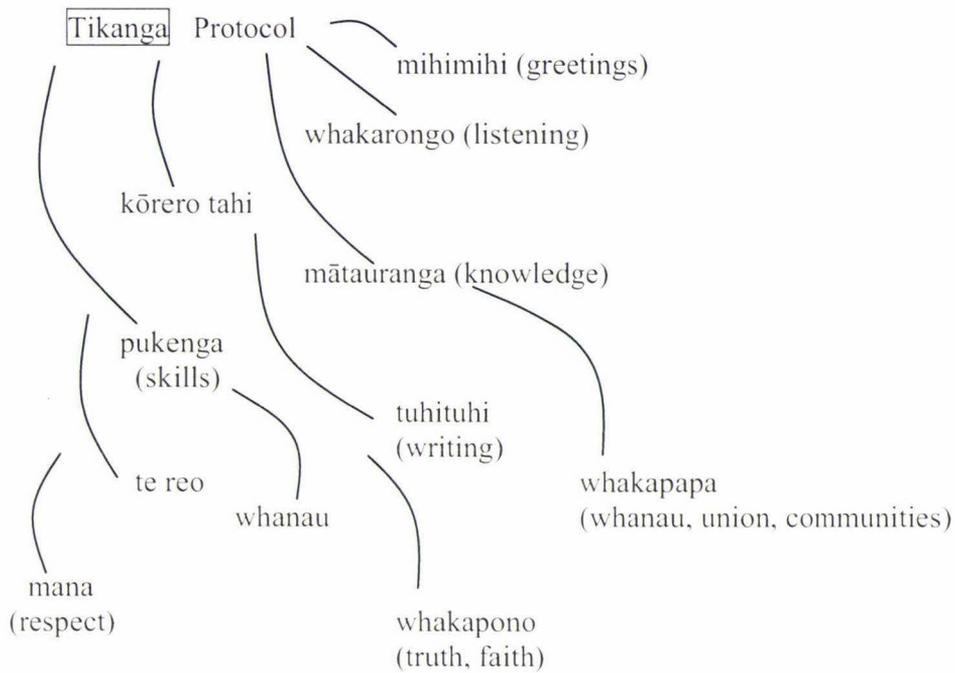
- Regular meetings
- Set agenda
- Recorded group interviews
- Agreed protocols
- Transcribed notes
- Kai (Kāpai ngā kai!!!)
- Laughter
- Listening
- Talking
- Sharing

Values



Learnings

- Social capital
- Other workers' experiences
- Meeting George (Koletsis)



kawa procedures

- kōrero
- make a plan together
- implement the plan
- evaluate
- describe experiences in our union
- describe union education and training

Whakatauki māori sayings

He aha te mea nui
Ō te Ao?
He tangata
He tangata
He tangata

What is the greatest thing in the world?
It is people, it is people, it is people!!!

Whaia te iti kahurangi

Ōku whakaaro my thoughts

- Highlights
- Meeting other workers from our union sectors
- Understanding their workplace situations
- Building awareness of skills & experience amongst our union membership
- Good mix of governance and members amongst participants
- Exchanging knowledge and sharing experiences
- Manaakitanga – kai and hospitality
- Reading transcripts
- Poster
- Expressing te reo Māori values
- Bridging the gap – and the role of ERE

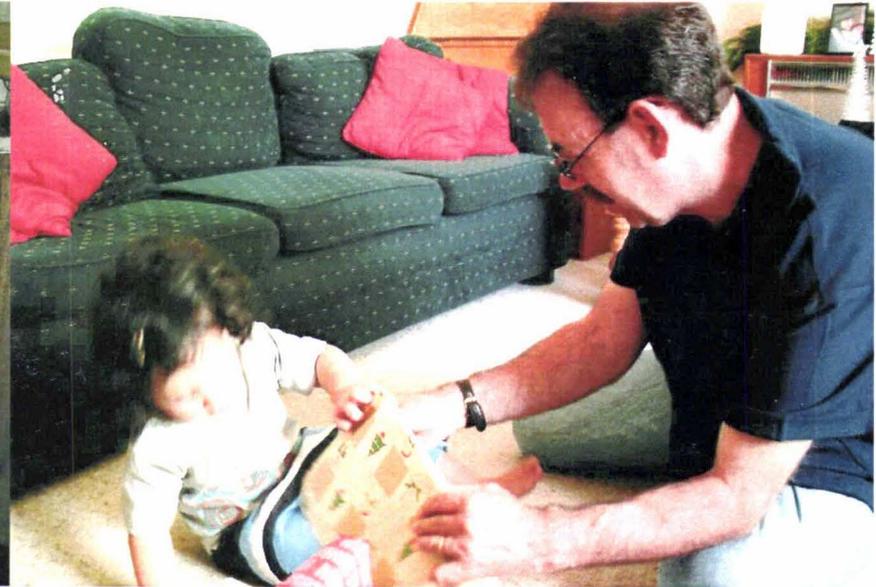
PHOTOGRAPHS - Matariki



Caption 1:

Matariki and new born mokopuna, 2am June 22, 2008

“Knowledge is whakapapa. Whakapapa is knowledge.”



Caption 2:

Matariki’s partner with 2 year old mokopuna.

“Learning together is about passing knowledge from one generation to the next.”

PERSONAL REFLECTIONS – 99

(From the journal kept by 99)

Before First Meeting

- 1) Excited
- 2) Wondering how to tell which courses I attended on ERE leave as I have attended so many and some (my) union has paid my wages and some I have taken annual leave for.
- 3) I spoke with Jody A and J at the office and got some idea of what ERE leave courses I had done.
- 4) Have to say I was worried about how much work I might be expected to do and how complicated the work will be if it is for a university thesis.
- 5) Interested in what the outcome of all the information would achieve (sic).
- 6) I felt privileged to be asked by union official from another union to participate in such a project.
- 7) This made me feel even prouder to be a SFWU member, delegate, member-organiser and Regional Executive member.
- 8) Hoping I would be able to attend all the meetings as I am involved in a lot of meetings and I was hoping I would be able to fit this one in.
- 9) Excited about working with some new SFWU people and sharing ideas in a cross section of industries/sectors.
- 10) This will be another chance, another forum, for me to express my views. I like to make the most of these opportunities.
- 11) Once I received from J the courses that they could find that I had attended on ERE leave I was very surprised. We only get 5 days (per) year and I try not to use them all so other delegates in my workplace have a chance to use the same ERE training days. I had still attended quite a few ERE courses over six years though.
- 12) How many will be there? How many people will I know?

- 13) I have found the computer a very good tool when I have researched about things I have been involved in and I would have to say I have increased my computer skills trying to work out how to do things or find things out.
- 14) I have also acquired some health sector documents that have helped me in some of my work, such as Health and Disability Sector standards, Old Peoples' Homes Regulations, unit (standards) in National Certificate in support of Older Person qualification.

During Meetings

- ❖ Smaller group of people participating than I expected and I knew all but two of them.
- ❖ Ross was / is an upfront OK person (and) explained everything well before, during and after each meeting so we knew what to expect, which was great.
- ❖ It was very interesting reading through the transcripts and reading what we said.
- ❖ I felt we were a very respectful team. We didn't disrespect each other's point of view and we listened patiently to each other's experiences and opinions.
- ❖ There was always a commonality. Employers push their boundaries and we have to fight to get what is right for ourselves or fellow members.
- ❖ We were a little quiet and shy in the beginning probably not really sure what to say. We soon loosened up and said what we felt 'from the heart'.
- ❖ It was fun working on the poster. We worked very well as a team. We do a lot of that at workshops and in training (sessions).
- ❖ I wish I had kept more of a record of all training I went to and marked what was done on ERE leave.
- ❖ I was sorting my paper work and in my office at home. I have kept most of (the) training stuff etc. and meetings I have attended. Being involved in this project made me quite aware that most of the work I have got involved in (happened) after my first ERE leave training as an Aged Care member-organiser in 2002. I have become more sector focused since then and more politically focused. E.g. I have worked on industry standards (/) industry training packages. (I) have joined local Labour Party meetings and joined their committee. Spoken to MPs,

to the Minister of Health, Associate Minister of Health, etc. about Aged Care issues. Presented petitions at Parliament. Been to Health Select Committee hearings. Attended Labour Party conferences and talked about Aged Care and low paid workers. Got involved in Regional Executive as Health Sector Rep, etc.

- ❖ John Ryall spoke to me after a meeting and said he was very impressed with something I said. That gave me a real 'buzz' and encouraged me more that I was on the right step/path.
- ❖ Ross seems worried he is directing our flow of thought too much. He isn't actually putting words in our mouths though; he is just making us THINK.
- ❖ When you talk to people re: your workplace and how you are unhappy etc. they can't understand why you stay, even my husband asks me. But most Aged Care facilities have the same problem so moving to another site doesn't make the problems go away.

After Meetings

- ❖ Missing the get togethers and discussions.
- ❖ Have to be more disciplined now and focus on the last bits; doing this notebook and research profile.
- ❖ Looking forward to seeing the end product.
- ❖ Was great being involved in the project.
- ❖ The project has made me quite aware of how my union education has increased my knowledge, confidence, ability to listen and get my point of view across.
- ❖ I have to say when you try to get other members involved in anything, and get people (wanting) to know what is happening, can be very difficult. They don't understand that the more people that get involved and push issues the quicker things will probably happen.
- ❖ Members just seem to think things happen. They don't seem to realise how much time, effort and hard work (goes) into getting things done or trying to get things done.

PHOTOGRAPHS – 99

I am aware I have made captions lengthy. I needed to explain my feelings, etc. as well. Hope these photos and thoughts/comments are of some help. My union work is part of my life now (and) part of my family life also.



Caption 1: Rimutaka Hill Summit view

In 1978 I left Masterton to go to Wellington Hospital to do my Enrolled Nurse training. I regularly travelled over the Rimutaka Hill going to and from Wellington/Masterton. Once I finished my training I worked with the elderly in (the) public and private sector and as Home-help, worked with the disabled. After many bad and good experiences I got involved in the union movement to make things better for CARERS and those being CARED FOR (*99's capitals*). This Hill still provides my 'work, life and family' balance as I return to (Masterton to) visit family.



Caption 2: Paekakariki Motor Camp

I attended member-organiser ERE training (here) early 2002, with SFWU. This was the beginning of me getting more active in (the) union movement and getting more involved in Aged Care to make a difference.

Photographs – 99 (Continued)



Caption 3: Paekakariki Beach

When attending member-organiser training I spent time walking along the beach talking about work and ‘how things could be better’ with other Aged Care workers.



Caption 4: Two Aged Care Facilities

Medium and large scale facilities show how the Aged Care market is growing. There is money to make in the industry for investors. Workers are low PAID though and this creates high turnover of staff, affecting the level of resident level.

Photographs – 99 (Continued)



Caption 5: Transport

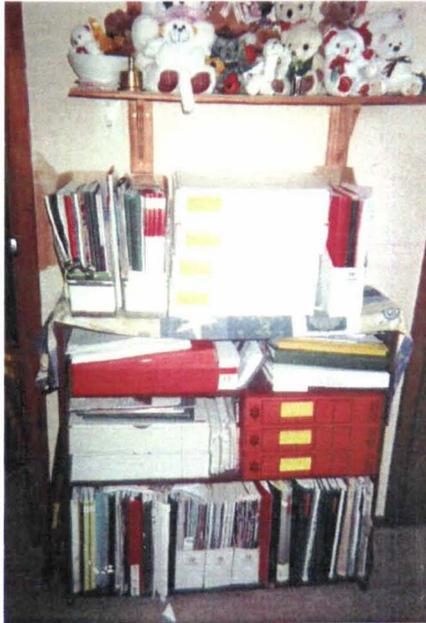
Public transport mainly to and from meetings. Bus, car, plane. As I don't drive I have to plan well ahead to organise transport.



Caption 6: Communication and Information

Computer, phone and cellphone. Emails, text and phone calls are a vital link (for organising) meetings and (obtaining) information. Computer and phone research are needed at various meetings I have attended. Needed office space at home for (the) level of work done and to keep things together.

Photographs – 99 (Continued)



Caption 7: In Office at Home

Bookcase full of notes from ERE training, meetings attended, projects worked on, information and research. This shows that I have done more training and become more politically – and more sector - involved since (the) 2002 member-organiser ERE training.



Caption 8:

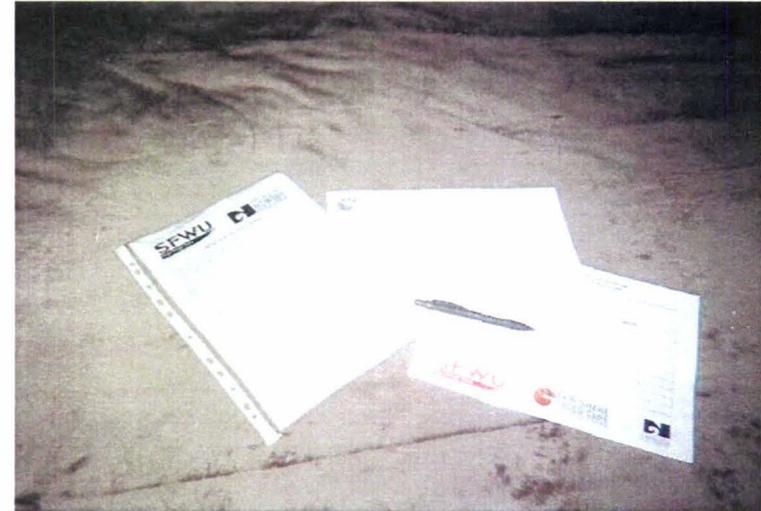
Some of the petitions that I have been involved in. I have also been involved in presenting these petitions to MPs for support. Going out on the street in the community, to local clubs, to family, workers to get signatures on petitions, and then presenting these petitions to Parliament. I have also attended Health Select Committee hearings about some of these petitions.

Photographs – 99 (Continued)



Caption 9: The New Zealand Parliament

I have become very politically active through ERE training and more politically aware. (The) Aged Care sector relies heavily on government funding, regulations, standards and government strategies. I have also attended local Labour Party meetings since 2003 and Labour Party conferences, etc. I have spoken at these conferences at times and have given input into workshops, spoke to remits, etc.



Caption 10:

I have been involved in committees for 'Health and Disability Standards' and setting up training qualification packages for Aged Care workers and home support workers (as an Aged Care worker). These standards, qualifications, agreements, regulations, etc. are all things that I refer back to in my day to day work. They are not freely available in the workplace, but they provide valuable information to me for meetings that I attend and in my workplace. So I know my Rights and my work mates' Rights and the residents' Rights and (the) employers' responsibilities.

PERSONAL REFLECTIONS – Wikitoria

(From the journal kept by Wikitoria)

Thoughts before the meetings

During the meetings

After the meetings

Letter sent 1.10.07:

Union education research proposal. Do you want to be involved?

Thoughts of ERE while being a member. The time (*this would take*) was also considered as this would have to be scheduled into my lifestyle. My thoughts of travelling would be considered as this would be by my way giving back to the union (not claiming for petrol).²⁹

Comments between Marianne and myself were about our backgrounds with ERE leave - which identified (*how much*) ERE leave (*we had used*).

The meal provided was very nice. This could be good – (*with a good meal being*) provided each meeting.

Reading the Employment Relations Act 2000. Part 7, Employment Relations Education Leave (s70 – s79). (The) object of this part is to provide paid leave to certain employees to increase their knowledge about employment relations for the purpose of

- a. improving relations among unions, employees and employers.
- b. promoting the object of this Act, especially the duty of good faith

²⁹ RT Comment: Wikitoria lives on the Kapiti Coast, north of Wellington, and had to travel a return journey of 60-80kms for the research meetings in Petone.

I found (Ross's) question hard to answer – only because I didn't understand the Employment Relations Act 2000.

The connection to the employees and employers. I found this more (*difficult*) as I felt more confident researching information using the process that's in place. (sic)

Relationships to other workers. I found listening more was more of an accomplishment and encouraging them to consider solutions.

Received transcript (first meeting) 26th November 2007. Discussed the question, 'What have been the changes that you have experienced following your involvement in ERE programmes run by SFWU?'. When I saw the script I didn't really read it (and) placed it with the other paper work. I did browse over my comments but that was that. Organising myself helps me be more effective with planning.

Thinking back on the transcript I remembered Matakriki's comments about the democratic structure and processes.

Transcript of first interview with research group. Being educated on a topic or subject that I personally drive or am passionate about will (*make me*) go further. Having others involved just clarifies things, and knowing there are others to talk to (*helps*).

BIG eye (*opener*) was understanding (*more about*) social capital building. George (*Koletsis*) was a good listener when he visited. His body language helped me feel comfortable about my personal views as to what I understood.

Where we are today:

(A) great victory if this was achieved.

Comment: I've kept everything organised in a folder from when we started. It's been a challenge to comment with the focus group task. Realistically, my training on ERE (*has been*) about knowledge and furthering yourself in all directions. Research, reporting back and follow-up on a task. (*This*) directs me as to any decision making and a final closing process.

PHOTOGRAPHS – Wikitoria

Taking photos has been really hard to do as you don't know or define what you are looking for. I took photos of what I have been doing but (wanted to have) photos of workmates with consent and workmates as well. From the camera I have chosen four as my project. Over all it was easier to express my thoughts with (these) photos.



Caption 1:

For me this represents the support of each of us having the 15 players to play the game. Reserves are always needed and with each other's support we can't accomplish a 40 minute game.



Caption 2:

For me this represents the concentration, communication and team work. 'DEFENCE'.

Photographs – Wikitoria (Continued)



Caption 3:

This represents 'emptiness'. To make change you need to experience the moment of time, place of time and change of time.



Caption 4:

'Harmony'. Wishful thought, relaxed peace of mind.

PERSONAL REFLECTIONS – Polly

(From the journal kept by Polly)

Hi Ross, doing your research group has made me think. I had never thought about what being in the union or doing training through EREL did to change my life. Before doing the training I would have never questioned the boss but now I know my rights and the rights of other workers, and I will stand up for myself and others. If I don't know something now I go and find out. If I don't understand what is going on I will ask questions until I do.

In my life outside of work things have changed as well. I don't let anyone push me around anymore. If I think something is not right I say so and I will fight for what is right.

My life is so much better because of the EREL training and being a union delegate. It is amazing how much confidence you get and how that can change your life and the lives of your family.

My kids' lives are better because I teach them some of the things that I have learned during EREL, like how to deal with difficult people and they can use those skills at school. They also know that I now won't take any crap from their teachers at school and will make sure they are treated right, which has given me more confidence.

PERSONAL REFLECTIONS – Tractor

(From the journal kept by Tractor)

The first night when I arrived at the SFWU for this exercise was (*the thought*), 'Oh dear, the others are all females'. I was shy and not really confident. However, that soon was to change.

We all had to tell Ross about ourselves and I happened to be the first person to speak. I told the group I was a security guard delegate for XXXXX and also gave a bit of my history to them. This was the start of becoming more confident and I felt that I could play an active part in the group.

I learned a lot from the ladies about how they operate as delegates and I felt my confidence growing, and this has helped me become more active in my work as a union delegate at XXXXX, having now been involved in at least three personal grievance claims against the company. One of these was my own personal grievance and the confidence gained by being part of this group helped me to win my case and two others.

Finally, the camaraderie built up with all the other delegates and Ross is amazing and I wish Ross all the best with his thesis. I have really learned a lot by working with the females in this workshop.

PERSONAL REFLECTIONS – Lyn

(From the journal kept by Lyn)

“(My) feelings and thoughts on the research and discussions we had:

- 1) I felt out of my league with this research.
- 2) I enjoyed learning things that will always be useful in the future.
- 3) Has made me aware that I am only at the beginning of my union life and can't wait to get more involved.
- 4) Have found what I learnt I'm using in everyday situations

Thank you for the opportunity of being involved with this (project) and I wish you all the luck with the study.”

Section C: The Officials' View of ERE

John Ryall & Jody Anderson interview

On April 9, 2008 I interviewed SFWU national secretary, John Ryall, and the Union's Wellington-based part-time education organiser, Jody Anderson. The interview with John and Jody took place in John's office at the Union's Petone headquarters. I had kept in contact with John and Jody over the months preceding the interview, providing intermittent progress reports on the research work I was doing with the SFWU delegates and activists. At the end of the research cohort meetings I wanted to talk with these key officials from the Union to get their perspectives on ERE and union education, in general, within the SFWU.

Jody Anderson has facilitated SFWU education workshops involving most of the research cohort participants. She has seen their confidence grow with each education gathering:

"I think that's what education does for them. I think having tools in their kit if you like, to be able to do their job as delegates in a confident and active way in the workplace."

Jody

Education for the SFWU's member-activist base is an important part of the Union's campaign capacity building strategy. John recounts the impact of media workshops run in 2007 for delegates and activists who were involved with the Union's 'Healthy Hospitals' campaign:

"It was absolutely fantastic and the delegates did some great work in the media bringing a power to our campaign that we could never have achieved without this training. And I noticed the difference with these individuals as well. Their ability to articulate messages succinctly greatly improved and also their ability to think on their feet."

John

John explains how the Union's education programme is also a key resource for the training of volunteer organisers, a group of members he maintains are making a significant contribution to the SFWU's organising efforts:

"I don't think a lot of people understand that unions like our own don't exist any more around full-time (paid union) employees, but through hundreds of trained worker activists who all do heaps of work in their own time or employer time. A major company is currently challenging our right to access trained member organisers on to their sites saying that they will only allow full-time union employees entry. While they say it is because our trained member organisers come from a competitor company, they are actually taking on the reality of what the union needs to do to organise."

John

John says that prior to the ERA his Union undertook a significant amount of delegate and activist training. There were some contractual provisions for release. However, the Union had to rely heavily on many of its employers to agree to release delegates – often without pay. This meant a large lost wages bill needed to be covered by the Union:

"We relied on clauses in collective agreements to get them off and it just meant the amount of money that the union was actually paying in terms of that education work was pretty substantial compared with what's done at the moment (using EREL). So, I think we still did as much but it was much more draining on the union's resources."

John

John says members attending union education and training workshops came to expect that, for some, there would be a personal cost:

"(It) did require a lot of sacrifice from our members in terms of not actually getting fully reimbursed for their wages and stuff. People used to take annual

leave and other things to actually come along to the education programmes because they actually valued it.”

John

Jody Anderson, herself an ex-volunteer member organiser, attests to what John says:

“That’s certainly the case with member organisers. I know myself and other people – we took annual leave and unpaid leave because I think there was that commitment from delegates.”

Jody

According to John, the SFWU has a membership turnover in excess of 35 percent per annum. This is a drain on the Union’s limited resources as it has to constantly recruit and educate new delegates and activists to replace those who have left. However, John says those who leave the Union will often make positive and constructive contributions beyond the Union elsewhere in society, what he calls building “social cohesion”:

“(We) are developing people who very quickly move on to other things. So we’re a union that needs to constantly be educating and re-educating. Quite often we have people who have played their part and they’ve decided to place their priorities somewhere else....their education is being used somewhere but not necessarily in the same role or function as it was before. It may be being used in community or family activity, or something else... we (are) not just developing people to be active workplace delegates but we’re developing them to be leaders in their families, to be good mentors for their kids, and to have a wider perspective of what the world is and what the important values of the union are based on.”

John

John recalls the story of one member who was active in the SFWU, being a cleaner at the local university:

“One of the people who surprised me was a guy who used to be a cleaner at the university. He got involved in the union and attended a number of education programmes we ran. Then he got selected as one of the people in an SFWU contract cleaners photographic exhibition as he was enthusiastic about our campaign to get better legislative protection for cleaners employed by contract cleaning companies during competitive tendering situations. In doing this I found out he was actually a Ratana Minister. Our campaign coordinator...conducted an interview with him for the photo documentary. Of course he started telling her about all this amazing work he was doing at the weekends and at nights. I don’t know how the hell he got the time to sleep actually. He’d be around at people’s places – through deaths and births and marriages, providing support to people in distress. His story of how the union was knitted into his life was amazing. And his story about what an important vehicle the union was for him and how the union experiences (including union education) strengthened his religious faith and encouraged him in the work he was doing was truly enlightening.”

John

Jody has a deep respect and affection for the delegates and members she is involved with educating. She is often impressed by their selflessness, coupled with their desire to think beyond getting a weekly wage:

“A lot of the community workers – they (are) working in jobs, and in rest homes, with people. And for them it’s not just about money, is it? They’re caring for people – for vulnerable people – and they’re getting paid, often, terrible wages. But that makes them the people they are. That makes them quite unique and special. And when they talk about being in the union it’s not just about conditions it’s also about conditions within the industry that affect the client. That’s a part of why they want to be involved and be active – which also says quite a lot about the kind of people that they are.”

Jody

For Jody and John the paid union organiser plays a critical, central role in a delegate's education and development. They say without a strong relationship with their organiser, a delegate will struggle to learn and be effective in their role.

“(If) you look at who's most active in our union, I think that reflects hugely on the organiser and the good relationship that they have with the delegate, and the support they give the delegate, the open communication and regular communication, and checking in. I think that that's why people feel confident enough to take that step to participate in education and in bigger things because there's that support.”

Jody

For John, it is all about building trust between the delegate and the organiser:

“People will do some amazing things and go the extra mile if they feel that the organiser's there with them. (If) they think the organiser's pretty passionate about what they're doing, that they care about them, they talk to them, they respect them and they provide good feedback and support, then they'll do a hell of a lot of things. True adult education is built through the bond of trust and respect between the so-called teacher and the so-called student because both are learning from each other. I know that when I was a delegate I learned heaps from those older and more experienced delegates and organisers that I worked with - through planning, action and reflection, even though I never did any formal union education courses because my union was so useless. As a union organiser I have learnt heaps about myself, about organising and about members and their cultures through planning an action, participating in that action with them and then talking about it later.”

John

But high demands on an organiser's time in relation to handling disputes, grievances and bargaining mean that they will not always have the time, or energy, to spend supporting delegates with their learning and development. Consequently, Jody says the follow-up work with delegates post union workshops will often not happen:

“I don’t think we have the solution yet either because organisers have so much to do in a week and ...unfortunately follow-up around education is not a priority. That is something that we juggle. We haven’t got it to a place that I think is great, but I think we get it right sometimes and that’s better than not at all. But I think it’s really important because there are things that the delegate will go away with and that might be a task around mapping, it might be a task around finding another delegate or organising around an issue. (So) they’ll need the organiser to support them through that. They might go away with the tools but they’ll still need the support and someone just checking in on them.”

Jody

The SFWU sees the involvement of delegates and activists in the Parliamentary political process as complimentary to their role. There is often training before select committee sessions, generally not using EREL, to enable adequate preparation for the presentation of – and speaking to - a Union submission. John says, in his experience, at the end of the day most members find fronting politicians fun:

“Even though a select committee room is terrifying for most people, seeing they’ve practiced it and you all feel you are going as a team, it’s really good. It’s really powerful for the select committee when they have ordinary workers talking to them. They have a lot more respect for them than they do of officials. The one that we did with the vulnerable workers – this was the one where we were trying to get the Part 6A (of the ERA) through – we took a busload or two of people and we actually packed the select committee room. It was funny actually because (the employers) were going to be giving a submission so they wanted to see what we were doing. They went into the room first and sat down and then suddenly we all moved in and completely filled it, (the employers) were right in the middle and they couldn’t get out cause we were all round the walls. And at the end of the submission – and we hadn’t practiced this part of it ... our Samoan workers got up and sang a hymn. So everyone got up and the (employers), who were in the middle, got

up as well and we're all singing the hymn. So that made the workers feel pretty powerful with the employers joining with them. In the December 2007 SFWU magazine one of our public hospital delegates Vailima Hughes reflected on the opportunities the Union had given her of going to parliament, appearing before select committees and meeting up with cabinet ministers and the prime minister. She said that this whole experience was something that she was proud of and had given her more confidence about her own abilities to talk to those who she viewed as 'powerful'".

John

Conclusion

This chapter presents in detail results from the three major sources of data gathered in the course of this study, with the chapter divided into three sections to reflect this. The first section covers the five broad themes emerging from the four research meetings involving the cohort held between the beginning of November 2007 and the end of February 2008. The second section presents the member-activists' journals and photographs – recording their extensive range of experiences as union activists and their reflections on participating in the research study. The last section covers the April 2008 interview with SFWU officials John Ryall and Jody Anderson following the conclusion of the research meetings. Together this data, as presented, provides rich and dynamic insights into the way the cohort participants perceive and view their world, and the impacts that ERE has had on the way they act in that world. We see that as union activists they play a prominent role in the workplace as leaders, membership recruiters and problem-solvers. They work hard to build unity and solidarity with their SFWU members – and members from other unions. Their activism is often carried through to their communities where there is evidence their union education has equipped them to play influential leadership roles. The SFWU officials reveal their commitment and enthusiasm for trade union education and the role it plays on building the power and influence of their Union into the future.

Chapter 8

CONCLUSION

“It is the narratives of the powerful that are typically captured in the documented histories and public accounts. However, the hidden stories and the competing narratives of the less powerful also require research and analysis.”

(Smith, 2005, p2)

This project has found strong evidence of the transformational potential of Employment Relations Education (ERE) in three major inter-linked areas. Firstly, the study establishes that ERE is an important conduit for providing access to a potential transformative learning environment in the form of the democratic union classroom. Secondly, there is evidence that when, and how, ERE is used is important in terms of impact in driving a union’s progressive change agenda. Thirdly, what and how member-activists learn when involved with ERE programmes is crucial in regard to achieving the kind of desired change back on the job and in the communities in which they live. These three points are elaborated on in detail below:

Access to ERE

For the decade at the end of the last century New Zealand unions operated in a hostile legal industrial environment defined by the ECA. The unitarist tenets of this Act marginalised the collective rights and interests of workers and their unions. During this time union members had no statutory rights to union education. To secure release of members to attend formal union education courses unions had to rely on contractual arrangements with employers, or if these were non-existent, at the boss’s discretion or behest. This was an arduous and difficult time for many union members and activists. With the introduction of the EREL provisions of the

ERA in 2001 trade unions were able to allocate a variable annual quantum of (employer) paid leave for union members to attend education programmes to “increase their knowledge about employment relations for the purpose of (a) improving relations among unions, employees, and employers; and (b) promoting the object of this Act, especially the duty of good faith.”³⁰

Much like the impact that TUEA had in the late 1980s, ERE has been highly successful in seeing many thousands of union members attend union education and training programmes. Arguably, without the statutory right to ERE, it would be more difficult for union members to get access to formal trade union education.

Strategic use of ERE

The SFWU is located within a labourist orientation and is intent on the progressive achievement of wage and social justice for its membership. It recognises that union education plays a vital role in developing the skills, knowledge and understanding of its cadre of member-activists who are the vanguard of the Union’s change agenda. It maximises its efforts to strategically use as much EREL as possible each year. ERE makes up the bulk of the formal union education courses and workshops attended by the member-activists involved in this study – with only two of the sixteen courses they attended not approved for the use of ERE (see Appendix 9). The SFWU leadership says compared to a decade ago when it was operating under the ECA, there has been a significant decrease in the costs of running its education programme, particularly in relation to the payment of members’ wages when they are attending ERE courses. Under the ERA the employer is required to pay the member’s wages at the rate of their relevant daily pay.³¹

There are at least two major direct benefits that accrue to the SFWU from capitalising on its use of ERE. The first is self-evident in terms of developing its

³⁰ Part 7, s70, ERA

³¹ The government’s 2003 Holidays Amendment Act created the relevant daily pay provision and this was included as part of a range of ERA amendments in 2004. Relevant daily pay means “the amount of pay that the employee would have received had the employee worked on the day concerned”. This can be contrasted to ‘ordinary pay’, which essentially refers to basic earnings.

member-activists to work on the ground to build the Union and to make a significant contribution to its goals. The second benefit is the direct savings to the Union with employers having to meet the costs of members' wages for attending ERE courses. Unions, like the SFWU, do not have a wealth of resources with most members very low paid, as represented by the research cohort, together with the drain on resources associated with an annual membership turnover of 35%. With ERE, the Union has been able to channel its scarce resources to elsewhere in the organisation where they are needed most – particularly in areas like recruitment and campaigning.

An area of potential concern to the SFWU is the possible interference in the form and content of union programmes as they are subjected to the ERE course approval process. This process is administered by the DOL and requires unions, as well as employers, to submit their education programmes for approval to a 'panel of experts' made up of employer, union and tertiary education representatives. The programmes must be developed against a set of criteria deemed consistent with the ERA, as prescribed by the DOL. However, the risks of the union education programmes being contaminated by technocratic methods and content as a result of this process have not been obvious with this study. There seems little evidence that the course development and approval procedure has diluted Union's ability to offer workshops that are true to union principles and offering dynamic, stimulating and critical learning opportunities to members. However, this was a study that substantially looked at the impacts of ERE rather than scrutinising in any depth the domains of union course curriculum and teaching methods, and how this may be unduly influenced by the State's approval process. This is an area where there could be justification for further research undertaken.

How and what members learn

In a union context, transformation is a change process that can occur at a range of levels. This study has shown that for the member-activist within the social learning

environs of union education, transformation can occur when they start to develop a critical understanding of their world. This echoes what Freire called cultural action or “the vehicle whereby members of oppressed groups are made aware of the social contradictions that lock them into a position of subordination... (and) the means whereby the oppressed acquire consciousness of themselves as a political force” (Mayo, 2004, p47). In the course of their involvement with ERE the research cohort regularly described how they have been able to make more sense of their world by collectively sharing and problematising experiences, and go on to cultivate new strategies, ideas and solutions aimed at democratising the workplace and addressing members’ issues and problems. This represents a dialectical relationship between consciousness and the world, and is reflected in the Freirian pedagogical approach of praxis. The study has also found that ERE, together with other non-ERE union education, can not be seen in isolation from the vast array of learning that members encounter everyday on the job and beyond the workplace - in essence their experiential learning.

Learning for a change

Union movements in most advanced capitalist economies, including New Zealand, have struggled in recent decades against government and employer assaults, mediated by hostile laws and regulation aimed at promoting neo-liberal goals of increased competitiveness and productive economic output over the advancement of workers’ collective interests (Taylor, 2003). Advanced capitalism has cloaked the sharp edges of the system, but its inherent values and drivers remain beneath. It is an economic system that creates disparity and imbalance, and is intrinsically exploitative in nature. It can be good at producing ‘wealth’, but woefully inadequate at seeing the fair, just and equitable distribution of that wealth. To reverse the declining fortunes of unions in terms of membership, power and influence it is recognised there is a need for unions to adopt new organising strategies and approaches (Heery, 2005). There is a key role here for union education in terms of building consciousness around a renewal theme, and the need for broader participation by members in the life of the union (Croucher, 2004).

This collaborative critical research study began by asking the question, Employment Relations Education: Learning for a change? This is a deliberate 'double entendre' with one question being, 'Can union education provide meaningful, useful and relevant learning opportunities for union members in contrast to what they may have experienced elsewhere, particularly through their compulsory education years and formal workplace learning initiatives?' The other, arguably more pertinent question for this research, asks, 'Given that ERE is a statutory leave entitlement and places statutory conditions and obligations on unions, is it possible to have critical learning happening with ERE, of the type that promotes a union-driven transformation agenda for the workplace and society?'

ERE can not be seen in isolation from other trade union education or broader union agency. In the SFWU education is central to the fabric of union life, and plays a key role in regularly bringing together member-activists to foster their sustenance and development as effective agents for change. ERE has been a means of giving voice to the members-activists in this study, giving them a sense of power and providing the confidence to be able to engage with their employers on issues impacting members as well as the motivation and commitment to be active in the community. Many in the cohort have shown that they have been able to make a positive and progressive impact on the job in terms of the quality of working life for the members they represent. Also, the SFWU has been highly successful in making progress in achieving changes to legislation and government policy that have directly impacted and improved the lives of members and workers in the industries where the Union organises. A high proportion of member-activists in this study have been directly involved with making that change happen. In other words, ERE is about learning for a change and there is even more potential to be tapped.

APPENDICES

Appendix 1

Approved ERE Providers and Courses – as at September 2008

Union / Worker / Employee Organisations ³²	Approved	Pending Re-approval
Amalgamated Workers' Union - Northern	1	2
Amalgamated Workers' Union - Central	1	0
Amalgamated Workers' Union - Southern	1	2
Association of Professional and Executive Employees (APEX)	1	1
Association of Staff in Tertiary Education	5	4
Association of University Staff	5	9
Clothing, Laundry and Allied Workers Union/Unite!	5	1
Finsec	5	7
Flight Attendants and Related Services Association	0	1
Manufacturing & Construction Workers Union	2	1
Maritime Union of New Zealand	1	5
Meat Union Aotearoa	0	3
Medical Laboratory Workers	1	1
National Distribution Union	3	16
National Union of Public Employees	3	3
NZ Airlines Pilots Association	1	0
NZ Amalgamated Engineering, Printing & Manufacturing Union	11	1
NZ Council of Trade Unions and affiliated unions	26	5
NZ Dairy Workers' Union	0	3
NZ Education Institute	1	19
NZ Meat Workers' Union	1	7
NZ Merchant Services Guild	0	1
NZ Nurses Organisation	13	4
NZ Police Association	1	1
NZ Public Services Association	9	0
NZ Resident Doctors Association	0	3
Post Primary Teachers Association	1	9
Postal Workers' Union	0	1
Rail and Maritime Transport Union	0	2
Service & Food Workers Union	8	8
Southern Local Government Officers Union	1	2
Young Workers Resource Centre	0	1
Totals	107	123

³² As from the ERS website, http://www.ers.dol.govt.nz/ere/ere_courses.html, downloaded 3 September, 2008

Background paper provided for participants at the first pre-research meeting at SFWU Petone, 24th October, 2007.

Employment Relations Education: Learning for a change?

A research project for Masters in Education (Adult Education)

Some background:

My name is Ross Teppett. I am married to Kirsty and have three kids – Jack (19), Finnius (15) and Sylvia (11). I was born and raised in Foxton (Horowhenua), spending my first 13 years there. I did my high school years in Palmerston North – going on to do a science degree at Otago University. In my summer holidays I did hay making and worked as an orderly at Palmerston North hospital. My first full-time job was working in a bar in Palmerston North – and being a proud union member of the Hotel Workers’ Union. After a year long O.E. I returned to Aotearoa and trained to be a journalist. I worked mainly in the radio journalism field for about five years and was an executive member of the Northern Journalists’ Union. I got sacked (dressed up as a redundancy) in 1988 from my Auckland reporter’s job following a bitter strike to renew the Private Radio Journalists’ Award. My employer said that my union activism had nothing to do with me losing my job (even though I was the only person made redundant!). I was lucky and got a new job with the Trade Union Education Authority – working as an educator on the State Sector Act programme (and knowing nothing about trade union education). In 1990 I was employed by the Engineers’ Union as a researcher. By the time the Employment Contracts Act was passed in 1991 I was organising – and did this until 1998 when I became an educator in the Auckland region. In 2002 I moved down to Wellington with my family to take up the national education role with the EPMU.

What do I want to do?

I am studying for two main reasons:

1. To do some useful research to help our union movement get stronger through learning more about union education.
2. For my personal and professional development.

Why do I want to work with the SFWU?

- I want to work with a group of union delegates and activists that have been involved in union training under the employment relations education leave provisions (EREL) of the ERA 2000.
- I want to work with a group of delegates that are not from my union. This way I do not have a professional, on-going working relationship with the research group. In a way, the SFWU is independent and the relationship with the research group is one of equals.
- I want to work with a group of Wellington based delegates as this will make it a lot easier to carry out the research project.
- No-one's identity will be revealed in the finished research.

What is the research about?

I want to know what transformational impacts have occurred through your participation in ERE programmes run by the SFWU since 2000. By transformational I mean that I am looking at the kind of fundamental changes that may have taken place as a result of your educational experiences. I do not know what this research project will find out – I have no pre-determined ideas or theories.

How will the research happen?

The key point to make is this will be a collaborative research effort. This is not a case of doing research *on* a group of delegates. I want to do this project *with* a group of delegates. I want you to be actively involved in doing the research – through your words and stories – and in the end producing the research ‘data’. This will very much be your research. I want to use a technique called focused conversation. We would meet as a group on several occasions, each time doing more talking, reflecting and thinking about the ERE that you have been involved with. Each conversation will be transcribed and brought back to the group to read, digest and comment on – paving the way for more focused conversation on ERE. I plan to have my thesis (the finished research work) handed in for marking at the end of August next year.

Ross Teppett

24 October 2007

Initial draft of the letter constructed for John Ryall on September 24 to send out to SFWU delegates inviting them to be involved in the research project. (The shaded text sections were highlighted for the SFWU's attention when preparing the final letter to be sent out).

(SFWU Letterhead?)

25 September, 2007.

(Delegate's Name and Address)

Dear

Union Education Research Proposal – Do you want to be involved?

I write to inform you about union education research proposal that is intended to be done with the Service and Food Workers' Union, and I'm inviting you to consider your involvement in this project.

The research is being facilitated by Ross Teppett, the national education officer for the Engineering, Printing and Manufacturing Union (EPMU), as part of his university studies for a Masters degree. We are happy to have Ross working with us on this research project and believe it will be very beneficial to our Union and the movement as a whole to have this work done.

What's it about?

Ross wants to evaluate the impacts of employment relations education (ERE) on the lives of union members. He wants to work with a small group of Wellington-based delegates from the SFWU. Ross wants to find out what kind of changes have taken place as a result of ERE – in relation to the

worker's own life and their work for their Union. The research involves approximately four, two hour group discussions carried out over about a three month period – starting in early November (with a break over the Christmas/New Year period). The research findings will be made public (towards the end of next year) but everyone's identity in the project will be kept confidential and anonymous.

What's the next step?

Firstly, we will be following up this letter with a phone call to you. We would like you to come to a meeting at the SFWU Office, 7 – 11 Britannia St., Petone, on

from 5.30pm – 7.30pm, to discuss the research proposal and the potential for your involvement. Ross will be at the meeting along with [REDACTED]. Ross wants to provide more details about the research proposal and what would be involved for members participating in the project. We intend to finish the meeting with a dinner.

Meanwhile, if you have any questions about this proposal please ring

or Ross Teppett [REDACTED] [REDACTED]

We look forward to seeing you soon

In unity

John Ryall
NATIONAL SECRETARY

Copy of letter sent out to SFWU delegates and activists October 1, 2007 by John Ryall inviting them to be involved in the research project.



1 October 2007

COPY FOR YOUR INFORMATION

Dear

Union Education Research Proposal – Do you want to be involved?

I write to inform you about an exciting union education research proposal that is intended to be done with the Service and Food Workers' Union, and I'm inviting you to consider your involvement in this project.

The research is being facilitated by Ross Teppett, the national education officer for the Engineering, Printing and Manufacturing Union (EPMU), as part of his university studies for a Masters degree. We are happy to have Ross working with us on this research project and believe it will be very beneficial to our Union and the movement as a whole to have this work done.

What's it about?

Ross wants to evaluate the impacts of employment relations education (ERE) on the lives of union members. He wants to work with a small group of Wellington-based delegates from the SFWU. Ross wants to find out what kind of changes have taken place as a result of ERE – in relation to the worker's own life and their work for their Union. The research involves approximately four, two hour group discussions carried out over about a three month period – starting in early November (with a break over the Christmas/New Year period). The research findings will be made public (towards the end of next year) but everyone's identity in the project will be kept confidential and anonymous.

What's the next step?

Firstly, we will be following up this letter with a phone call to you. We would like you to come to a meeting at the SFWU Office, 7 – 11 Britannia St, Petone, on Wednesday 24th October from 5:30pm – 7:30pm, to discuss the research proposal and the potential for your involvement. Ross will be at the meeting along with Jody Anderson and John Ryall. Ross wants to provide more details about the research proposal and what would be involved for members participating in the project. We intend to finish the meeting with a dinner.

Meanwhile, if you have any questions about this proposal please ring Jody Anderson on [redacted] or Ross Teppett at the [redacted].

We look forward to seeing you soon.

In unity

John Ryall

John Ryall
National Secretary

H:\62\6\rossteppetresearch\oct07.doc

Hi Ross

I have sent the letters out today to 15 members.

Cheers Jody



Central Regional Office
7-11 Britannia St, Petone
PO Box 33 121 Petone
Wellington 6340
Phone 04 566 8274 Fax 04 566 8271
Email central@sfwu.org.nz

The letter sent out to eight SFWU delegates and activists outlining the research question and what we would be doing at the first research meeting on November 7.

Friday, 2nd November

(My Address & Contact Details)

Dear (Research Cohort Member)

Just a quick reminder about our get-together for the ERE Research Project next Wednesday night (7th November) at the SFWU Offices at 5.30pm.

When we met last week it came up that it'd be a good idea to talk put a question to you all to 'start the ball rolling'.

Well, given the project research question is - 'Employment Relations Education (ERE): Learning for a change?' – I thought it'd be good to start with a question around ERE.

So, here goes:

“What have been the changes that you have experienced following your involvement in ERE programmes run by the SFWU?”

Have a think about this question. Don't worry if you don't think you can come up with any ideas or comments. The key thing is we will be meeting as a group and discussing this question and everyone will have their chance to have a say. For some background information, I have enclosed a copy of the ERE object clause from the Employment Relations Act 2000. We can talk about that as well.

Looking forward to seeing you next week.

Kind regards

Ross Teppett

Employment Relations Act 2000

Part 7 Employment relations education leave (s 70 to s 79)

70 Object of this Part

The object of this Part is to provide paid leave to certain employees to increase their knowledge about employment relations for the purpose of—

- (a) improving relations among unions, employees, and employers; and
- (b) promoting the object of this Act, especially the duty of good faith.

Letter that was sent out to SFWU delegates and activists as a cover for the first transcript from our meeting on November 7.

Monday 26th November

Hi All,

At last, here's the transcript from our chat on the 7th of this month. Sorry it's taken so long... it ended up being quite a mission!

So, what next? The thing to do is make a nice cuppa – or two – and read through this transcript, making notes in the 'comments' column. These might relate to the accuracy of what has been transcribed (you might be saying 'I didn't say that' or 'I didn't mean that!') – or what you read might spark some new thoughts or ideas. You may want to read the transcript in 'chunks' as there is quite a lot to read through!

I have a few areas I want to follow up on when we meet next week (**Wednesday, 5th Dec, 5.30pm at SFWU Office, Petone**), and I'm sure you will have your own.

Let me know if you are going to have any problems making it next Wednesday – my cell phone is [REDACTED] [REDACTED] work phone – [REDACTED] [REDACTED] and home phone [REDACTED]. Otherwise I really look forward to catching up.

Big cheers

Ross

Example of blank format for research interview transcripts

Transcript of first interview with research group

– SFWU, Petone. Wednesday 7th November 2007

Present: Ross, Tractor, Polly, Matariki, Lyn, 99 and Wikitoria

Who³³	What is being said³⁴	Any comments?³⁵

³³ Identifies who is speaking on the tape

³⁴ A transcript of what has been said

³⁵ Column for participants to make comments, additions or deletions to the transcript

Template used to gather Research Cohort profiles
Private and Confidential
April 2008
Research Profile (for use only by Ross)

Your name for this research project			
Your real name!!			
Your age	25 – 30	31 – 35	36 – 40
	41 – 45	46 – 50	51 – 55
Ethnicity (what you identify yourself as being e.g. Maori, Pakeha, European, etc.)			
Formal education and training history:			
Highest secondary school qualification			
Highest post-school qualification			
Your Work:			
A brief overview of your work history (since leaving school)			
Who is your current employer?			

2.

How long have you been with your current employer?	
What is your current job description?	
Your union involvement history:	
What unions have you belonged to?	
How long have you been a SFWU member?	
What union roles have you held and/or currently hold?	

Thanks for completing this form!!!

Covering letter sent out to SFWU member-activists together with their disposable cameras – May 19, 2008.

19th May 2008

At last here are the cameras!

Hi everyone

I know I've talked about this long enough, but at last here is a camera. Now comes the easy bit – where you take the photographs!!

Here's a quick guide for using the camera:

What do you photograph?

Anything you like!! Let yourself go!! The idea is I want you to photograph something that represents for you how you feel about your union education, your role as a union activist, you being involved with this research, etc. etc.

One important thing: in terms of the research project, it's important you don't photograph anything that can identify you – or you photograph someone that doesn't want to be photographed (this is because we have agreed for the ethics process that everyone is anonymous).

I want you to keep a record of what you photograph – and write a small caption (like those on my examples over the page).

Time-frame: I'm going to be tough and say I want you to send these cameras back to me by the end of next week (**31st May**) Shoot off as many photos as you like. If you do the whole 27 that's fine..... if you only do 6 that's fine.

By 7th June: I'll get the developed photos back to you.

By 14th June: You decide which photos you want me to use and send them back to me with your caption (I reckon up to 3 or 4 photos would be good).

If you're having any problems give me a call on [REDACTED] (my work phone); [REDACTED] (home phone) or email me at [REDACTED]

Look forward to seeing your work. Ross

P.S. Remember, don't fret it!!

* * * * *

Over the page I've done a couple of photos that I like and that say a lot for me about union things. They might help give you some ideas.

A couple of quick examples:



Caption: (from Blackball 2008): The Past meet the Present: For me, this represents the 'old' union movement; riders on horse-back, red flags and banners melding with the modern union movement represented by a sign-written modern car.



Caption: What I aspire for workers: balance, peace and tranquillity - like you get with a beautiful Coromandel beach.

The Cohort's Employment Relations Education – Workshop Details

This section looks at the various education workshops the research cohort have completed with the SFWU. Among the many workshops the delegates have attended there are some that have not been approved for the use of EREL. For the purposes of identification I have divided the workshops into 'Approved' and 'Non-approved' sections, and allocated the names of those from the cohort who have done each particular course. In some circumstances, a cohort member may have attended a course or workshop more than once. This is generally because the programme will contain some revised content or the Union believes there would be substantial merit in running the programme again for participants.

Part 1:**Approved workshops for use of Employment Relations Education Leave (EREL)**

	Course Title	Original Approval³⁶	Course Duration	Participants	When attended
1.	Enterprise and Industry Economics	NZCTU	Two days	Wikitoria 99 Matariki	October 2005 November 2005 August 2007 December 2003 December 2004 November 2005 November 2005 August 2007
2.	National Womens' Seminar	SFWU	Two days	Wikitoria	June 2005
3.	Union Women's Power Measuring & Achievement ³⁷	SFWU	Two days	Wikitoria 99	June 2005 June 2005
4.	Building our Power – Union Women in Action	NZCTU	One day	Wikitoria Polly	June 2007 June 2007

³⁶ This indicates the original organisation that was approved to use the course for EREL purposes. In cases where the NZCTU had the original approval, the SFWU has subsequently been approved by the DOL to use the course for EREL purposes.

³⁷ I was informed by the SFWU that the approved name of this course is different than 'Union Women's Power Measuring & Achievement' but the Union could not provide a record of the original title.

Approved workshops for use of Employment Relations Education Leave (EREL) – Part 1 CONTINUED

	Course Title	Original Approval	Course Duration	Participants	When attended
5.	Organising in the Workplace (<i>Organising Your Workplace</i>)	SFWU	One day	Wikitoria Polly 99	? ³⁸ November 2005 ? ³⁹
6.	SFWU National Womens Conference ⁴⁰	SFWU	Two days	Polly 99	June 2007 June 2007
7.	CTU Advanced Delegates' Planning ⁴¹	NZCTU?	?	Polly	March 2006
8.	Be Active	SFWU	One day	Polly	November 2005
9.	Northern Region Māori Hui (Hui Mo Nga Kaimahi Māori)	SFWU	Three days	Matariki	June 2005
10.	Nga Momo Whakaritenga mo Te Maori: Maori Models of Organising	NZCTU	Two days	Matariki	November 2007
11.	Nga Kaimahi Māori	NZCTU	One day	Matariki	June 2006
12.	Te Ara Taumata: Māori Leadership and Organising	NZCTU	Two days	Matariki	May 2007

³⁸ SFWU unable to find record of when Wikitoria attended this course.

³⁹ As above

⁴⁰ According to the SFWU, this programme was the same as used for the National Women's Seminar above.

⁴¹ The SFWU reports some confusion about the exact name of this course and the course duration details.

Approved workshops for use of Employment Relations Education Leave (EREL) – Part 1 CONTINUED

	Course Title	Original Approval	Course Duration	Participants	When attended
13.	Introduction to Your Union ⁴²	SFWU	One day	Tractor Lyn	2007 2007
14.	Dealing with Problems on the Job	SFWU	? ⁴³	Tractor	2007

**Part 2:
Non-approved workshops**

	Course Title	Original Approval	Course Duration	Participants	When attended
16.	Clean Start Sign Up Workshop	N/A	Three Days	Polly	2007
27.	Biennial Delegate Conference	N/A	Two days	Matariki	October 2003

⁴² The SFWU now calls this course *Your Rights at Work*, and it is recorded as such on the DOL website. The SFWU could not confirm when in 2007 that Tractor and Lyn attended this course.

⁴³ The SFWU could not provide information on course duration and when Tractor attended the workshop.

Confessions of a trade union educator, activist and very part-time academic researcher

I have worked as a trade union educator in total for close to 13 years – briefly with TUEA (1988-90) and the EPMU (1990 – today). I have had other significant roles in the EPMU – notably time as a researcher and six years ‘on the road’ as an organiser.

From a young age I was interested in the concept behind unions, or what I saw as having the ability to stand up to or question the boss. There always seemed to me to be something innately ‘right’ about belonging to a union. It was a case of building power and support to balance that held by the boss.

I was born and raised for the first 12 years of my life in Foxton, a small provincial New Zealand town. My father was a general practitioner. My mother was a nurse and looked after the running of dad’s business, as well as running the household and raising myself and my three older siblings. I had a middle-class upbringing in a predominantly working class area that also included a blend of farming families, teachers and small business people. In the 1960s, most people in the town had jobs supported by the local flax industry (for the manufacture of flax carpets), or travelled to the freezing works at Longburn and Fielding, some thirty to forty kilometres away.

In those early years I was exposed to much of what life was about for working families. There was the regular stream of patients to my dad’s practice located at my family home. Many of those who worked at the factory were being regularly injured and maimed. Then there were those school friends who would turn up to our rep rugby games with no gear or boots because they could not afford them. I recall our teacher and coach rushing off to find gear and making sure they had some

in time for the game. Years later, while visiting Foxton as an adult I was physically threatened by a local gang member in a hotel. A close old primary school friend – himself a member of the gang - intervened to defuse the situation.

As a hobby musician, I wrote a song about Foxton. It was about the demise of the flax and freezing industries, largely through the impacts of declining markets (for flax products in the 1970s) and the blitzkrieg of hard right wing economic liberalisation wrought by Roger Douglas in the 1980s.

*The seven o'clock whistle's gone
To the sound of progress marching on
To the ears of hundreds it must seem insane
Vacant to that morning noise again*

*It never supposed to be like this
They told us differently at school
It never supposed to be like this
They've gone and changed what we knew best*

I recall my father working diligently and tirelessly for his community – working long surgery hours tending to his patients, being called away to deliver babies and visiting patients in their homes until late into the evening, most evenings during the week and in weekends. Following the death of my mother, I recall him being investigated at least twice by the Inland Revenue Department because they did not believe his yearly income figures. He regularly did not charge patients and often did not claim the general practitioner subsidies he was entitled to from the government. It was a bitter irony that my father was killed during a home invasion in 1993 by a local teenager that he had delivered 19 years before.

I spent my secondary school years in boarding school in Palmerston North and did a science degree at the University of Otago. I am aware that I am the beneficiary of

a state-funded secondary and tertiary education system that has provided me opportunities unavailable – or unattainable – to many working class families. Certainly, in the late 1970s, the university campus looked and felt very middle class.

At university I was not overtly political or involved in issues political. I was interested in politics but I would not regard I had a passion for it. I did enjoy those times listening on the lawn in front of the Student Union to the political ramblings of the new MP for Mangere, David Lange and student politicians Chris Trotter and Michael Laws. Around this time I recall one of my older, perhaps more wiser, siblings saying I had a ‘latent’ consciousness. Reflecting on that comment down the years, I think he was right.

The first union I ever belonged to was the Hotel Workers’ Union (an early antecedent of the SFWU). I had a full-time bar job for a year in Palmerston North. I would not have regarded myself as an active member, but I felt comfortable being one. During this time I was only a peripheral participant in the anti-Springbok tour activities in the area. I never faced the direct ire of Police’s Red Squad but intervened on several occasions in the hotel when regular patrons attacked students innocently drinking in the bar. These were dark days in New Zealand – but influential and formative in terms of building political consciousness.

Following a return from a 10 month “OE” in 1982, I decided I liked the idea of a career in journalism. While doing a story on community education and carrying out an interview at a high school in Palmerston North, I was offered a relief teaching job for a term. I was to teach a couple of senior science classes. This was my first taste of teaching.

My first experience as a union delegate was for the PSA in 1983. I was working for the Broadcasting Corporation of New Zealand (or BCNZ) in Wellington. For the most part I had little or no formal training for the delegate role, and learned about

what to do by getting involved in disputes and grievances. I had some fine mentoring in the job that enabled me to operate more effectively. On one occasion, my local organiser and I held a tense meeting with the chief executive of the BCNZ, Ian Cross, on the issue of the dismissal of a colleague. We managed to save his job.

Following training for a year at a journalism school in Wellington, I started working as a radio journalist in Dunedin. For the next four years I held various delegate roles with a number of employers and, once having moved to Auckland in 1986, was an executive member of the Northern Journalists' Union. Towards the end of my short journalism career I became embroiled in a protracted dispute to renew what was known as the Private Radio Journalists' Award. A militant core of key employers in the private radio industry was determined to marginalise the role of the Union in the industry. I was the Auckland coordinator for a national strike that we lost. Under the law at the time there was no requirement for an employer to agree to a new Award and there was no ability to force an employer to compulsory arbitration.⁴⁴ At one national bargaining session, the employers would not agree to a redundancy agreement for the industry – but said verbally that with any future restructuring no one would be made compulsorily redundant. Well, I was the only journalist made redundant compulsorily. I'd been married a day, had a three month-old son and wife to support and no job.

About three months later I found myself working for the Trade Union Education Authority (TUEA) on their State Sector Act education project. I knew little about the Act or union education, but had enough of a union activist's track history to get the job. I ran workshops in the Auckland region for state sector workers who were facing a totally new work environment created by the SS Act. Looking back on this

⁴⁴ The 1987 Labour Relations Act was amended in the dying days of the fourth Labour government, introducing a provision known as Final offer Arbitration. This was to be used as a means of breaking any deadlock between the parties to Award negotiations, particularly if there was not any likelihood of an Award being settled or renewed, with the (Employment Tribunal) being able to settle. The Journalists' Union used this new amendment in 1991 to win a new Award for private radio journalists, concluding what was in effect three years of negotiations.

time I realise how little I did actually know, particularly in relation to the political and cultural complexities of life in the union movement.

In 1990 I started working for the Engineers Union in Auckland as a researcher. These were the dying days of the rapidly unravelling 'Lange-Palmer-Moore' Labour government. There was the strong prospect of change on the horizon, as many New Zealanders had been marginalised and were alienated by Labour's neo-liberal economic agenda. Within the Engineers' Union, great swaths of members had lost their manufacturing jobs due to the floating of the NZ dollar, reduction in tariffs and exposing local industry to international competition. I recall officials within the Union bracing themselves for an election defeat. This happened, in a spectacular – but not surprising - landslide fashion. Before the end of 1990 the new government had introduced the Employment Contracts Bill, its prescription of radical deregulation of the labour market.⁴⁵

The EPMU was created in 1995 following the amalgamation with the NZ Printing, Packaging and Media Union. I was working as an organiser in Auckland at the time of the amalgamation. A couple of years later I began working as an educator, working out of the EPMU's Auckland Office.

My work as an EPMU union organiser and educator has seen me over the years work with thousands of union members and activists in their daily struggle in the pursuit of fairness, justice and dignity at work and in their communities. I am passionate about my Union and unionism, what we stand for and what we are trying to achieve. I am aware that I am privileged to have the role I hold. I find it hard to recall a day when I have not wanted to 'go to work'. I can recall saying many times to my partner and friends, 'I can't believe I get paid to do the job I do!' However, I

⁴⁵ Commentators like Easton (1997) argued that a more export orientated and competitive economy demanded a major overhaul of the country's industrial laws. Economic arguments for laws like the ECA fit the analysis by Stiglitz (2006) of the kind of impacts that a neo-liberal orientated globalisation model has on national economies. Easton (1997), while not arguing for a radical union agenda, believed "a union movement more outside the apparatus of the state, and less tied to statute, may be able to play a more independent and constructive role in the development of the nation." (Easton, 1997, p131)

have never forgotten who pays my wages. I am committed to doing the best possible job as I can do as a paid official. So this reflexive research has been about ensuring I can learn from the process in terms of building my own knowledge and understanding as a union educator. In turn this may mean I can make a contribution that will effectively and, in some way, augment and build on members' struggle to achieve fairness, justice and dignity at work, to help them achieve real change and improvements in their working lives. I intend this research work to represent an important part of that commitment to do the best I can.

Post script

In the late stages of writing this thesis I had a chance conversation with a local council worker. Bill,⁴⁶ in his early 60s, talked with me about how he used to be a proud member of the Carpenters' Union. His most vivid memory of unions was when his father was without work for six months during the 1951 waterfront lock-out. Bill's dad worked on the wharves and was on the receiving end of a militant (National) government's desire to annihilate the waterfront unions. Bill says that his experience as a young child galvanised his political leanings to always be a 'Labour man' and take a pro-worker stance at the ballot box. On November 8, 2008, New Zealand voted to 'move to the right' with the election of what will be a National-led government. For many trade unionists and workers, me included, this will invoke the memories of the 1990s as the issue of 'reforming' industrial relations is again on the new government's agenda⁴⁷. However, the vagaries of the election process aside, many will be undeterred as the struggle for fairness and justice at work and in the community goes on irrespective of who holds the reins of power.

⁴⁶ Assumed name

⁴⁷ An example is the National Party policy of a 90-day 'no grievance rights' period which would mean a worker could be fired at will for the first three months in the job. As reported in Wellington's Dominion Post newspaper, November 10, 2008: 'Retailers Association spokesman Barry Hellberg said...they wanted to see the introduction of the 90-day probation period for new staff as soon as possible. "It provides flexibility," Mr Hellberg said.'

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