

CANADIAN LABOUR EDUCATION AND PLAR AT THE TURN OF THE 21ST CENTURY

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Abstract

This article is intended to update and deepen adult educator's understanding of the role of current Canadian labour education. It examines implications in relation to granting prior learning assessment and recognition (PLAR) of labour education.

Résumé

Cet article vise à informer les éducateurs d'adultes quant au rôle actuel de la formation au sein du mouvement ouvrier canadien. On y examine en outre les enjeux que représente dans ce contexte la reconnaissance des acquis.

Since the appearance of the article *Educating Union Canada* (Spencer, 1994) in this journal, a renewed interest and understanding of the area of labour education has emerged—one that recognizes labour education as an important segment of adult education in Canada. Such scholarship has been essentially dormant since the University of British Columbia studies of the 1970s (reported in Verner & Dickenson, 1974). With more than 120,000 participants per year engaging in forms of labour education, it is probably Canada's most prolific form of non-formal, non-vocational adult education (Spencer, 1994, 1998b). Friesen (1994) reflects on its historical significance as a contributor (or otherwise) to developing working class culture. Martin (1995, 1998) provides some insights into teaching objectives and the adoption of popular education methods in labour classrooms—illustrating some of the labour movement's most recent efforts to sustain workers' culture. Taylor (1996) discusses the impact of on-line learning on labour education, and the CASAE/ACÉÉA sponsored collection *Learning for Life: Canadian Readings in Adult Education* (Scott, Spencer, & Thomas, 1998) speculates on new directions labour education may take in the 21st century (see in particular Spencer, 1998a). There are other studies from the Ontario Institute for Studies in Education (OISE) linking education for work with labour education (both non-formal and informal) and union activism at a

local level (Livingstone and Roth, 1998; Sawchuk, 1997). These and a number of related studies are illustrative of a resurgence in labour education scholarship. In this article we concentrate on union-provided education and focus on aspects of labour education that have become more visible as a result of ongoing research into prior learning assessment and recognition (PLAR) of labour education. We address such aspects as steward training within the context of overall provision, special events and schools, literature and readings, participants in and deliverers of labour education, and objectives and criteria of success before looking at PLAR of labour education.

Context for Labour Education Research

Reasons for Resurgence of Interest

The roots of this resurgence are manifold. In part, it stems from an interest in understanding (or critiquing, in Friesen's, 1994 case) labour education's contribution to Canadian labour's resilience or intransigence (depending upon interpretation) in the 1980s and 1990s. It is also due to recent collaborative ventures among labour educators and university adult educators—for example, D'Arcy Martin's studies at OISE and the research program undertaken by ourselves and Jeff Taylor at Athabasca University. Such scholars and practitioners are interested not only in teaching labour education but also investigating and reporting on its significance.

The problems of defining and describing labour education are discussed in Spencer's 1994 article. Here it is enough to say that labour education includes all union and independently provided education designed to strengthen union representation, activity, and culture. It is not to be confused with workplace learning, which is essentially aimed at making workers more efficient and compliant human resources.

In our view, much of what workers learn in the workplace (the school of hard knocks) and labour education courses is worthy of formal recognition—college/university credit. This, of course, begs the question of how to evaluate this learning. At present, labour and other forms of education continue to be evaluated in terms of traditional higher education standards. This requires individuals to present a case on their own behalf when applying for PLAR, usually in the form of a portfolio. Naturally, it is easier to get credit for those labour education courses that resemble traditional classroom courses—courses with professional instructors, itemized outlines, assigned readings, and "objective" evaluation. However, much labour education does not (and we argue, should not) proceed in this manner. The danger, to our

mind, is that increased pressure may be brought to bear on labour educators to restructure their courses along traditional lines. This pressure may come from educational institutions, the state, union members seeking credit, or some combination of the three. This is a concern because it would shift the emphasis of labour education from social to individual purposes. Labour education is one of the few remaining adult education practices that challenges the notion of self-interested subjects competing for a limited supply of objects. The purposes of labour education remain social, rather than individualistic—individuals may learn new skill sets, but these are employed in the service of others, not themselves. Moreover, the success of labour education is not gauged in terms of performance on controlled tests, but in terms of whether graduates can “cut the mustard” in the workplace—handle a grievance, mediate a dispute, and so forth. In our research (see Appendix A) we do not wish to contribute to such a transformation of labour education; we are attempting to establish a mechanism that facilitates the translation of non-formal and informal labour education into college/university credits. This will involve evaluating the learning contexts of specific courses and programs, rather than the learning of individuals. The challenge, methodologically speaking, is to develop this mechanism in such a way that it does not impact existing labour education practices.

Methodology of This Research

Our method in this ongoing study of PLAR of labour education is to gather a representative sample of labour education courses provided by and for unions. From this sample, we identify commonalities among labour education courses in terms of content, objectives, methods, and length of study. Because the range of courses unions offer is immense, we have chosen to focus our efforts on shop steward training courses—almost every union *offers its members* shop steward training. Our analysis of a range of shop steward training courses provides a rudimentary grid of the features that shop steward training courses share. We then identify one or two of the best examples of shop steward training (based on this rudimentary grid, i.e., ones with most comprehensive coverage and documentation) and work with the providers of these courses to refine a matrix applicable to most types of labour education. The process is inductive in nature, moving from the particular to the general; but the objective is not to establish a general formula, or “law,” that will be imposed on practice. The matrix is intended to serve only as a touchstone that evaluators can use to calculate credit equivalencies for shop steward training (and other) courses, not as a prescriptive norm. Many unions have very good reasons for structuring their

shop steward training courses in a particular manner. Such individual differences need to be considered carefully and sensitively; differences must be weighed on their individual merit, not in terms of an abiding standard. It is imperative that the matrix remains dynamic, rather than static, and that unions have an ongoing opportunity to modify and refine its structure. Eventually, we hope to establish a relationship of trust that will allow us to work closely with labour education providers to develop a matrix that can assist in the assessment and recognition of most labour education courses and other events.

To date we have collected a wide range of materials and responses from more than a hundred sources, including most of Canada's major unions. These include trade unions; union locals; employee associations; labour centrals (such as the Canadian Labour Congress and the Alberta Federation of Labour); other organizations, agencies, and consortia; as well as a number of business and educational institutions which deliver basic labour education to unions and union members. We have created a file for each case, and almost 50 such files of complete union programs have already been summarized; these will form an integral part of the final report of our project.

Nature of Typical Labour Education in Canada

Steward Training as the Core of Labour Education

A major objective of the field research that one of us (Gereluk) conducted from 1997 to early 1999 was to gather material necessary to provide an overview of the content, nature, and extent of labour education in Canada today. The course and program packages, event brochures, materials, and other data gathered from a number of individual unions and organizations have come to us in various stages of development and articulation. In over 30 cases, these materials are supplemented by face-to-face interviews with education officers and union leaders.

The material packages indicate that steward-training courses tend to be the most well developed and documented. Although these steward-training courses may be similar in many respects, they also differ in important ways. This is largely because steward-training courses tend to be developed with particular needs and organizational priorities in mind. For instance, many are structured around specific collective agreements, implicit understandings, and legal frameworks under which shop stewards are expected to function.

These courses are essentially “tools”¹ courses intended to provide these lay representatives with the implements to do the job of a steward. An examination of course content revealed a number of common and recurrent themes: a close inspection of union structures, grievance handling, disciplinary protocols, membership assemblies, and contracts—as exemplified in the courses offered by the International Woodworkers, Canadian Division (see Appendix B).

Steward courses, however, describe only a small portion of the labour education presently made available to the members and staff of trade unions. Many of the other courses and experiences that unions typically include in their education programs are evident in the offerings of the British Columbia Government and Services Employees’ Union (Appendix C). These range from tools to issues courses—courses that typically link internal union concerns with external social issues, sometimes referred to as awareness courses—for example, courses on equity issues and sexual harassment. Some of the more typical courses are combined in this case with other courses that reflect the mission, priorities, and/or perspective of a particular union.

Depending on how fully developed and articulated the program, union courses and educational activities are also often layered or graduated. The education schedule of the Canadian Union of Public Employees (CUPE) provides an example of an elaborate program comprised of four different levels and numerous sub parts (Appendix D). This layering prepares members for admission and recruitment to the next level of union activity, participation, and education. Clearly, unions are providing their members with a sophisticated and integrated educational opportunity, more sophisticated than was previously offered and comparable to programs offered elsewhere (Spencer, 1998a).

Special Events and Schools

Our research also reveals that most unions and labour organizations round out their educational programming with a wide range of educational events and supporting activities, which are far from peripheral or “add-on,” because such activities serve to fulfill key objectives. And although individual unions sometimes provide “schools” and conferences, it is central labour bodies, labour councils, federations of labour, and the Canadian Labour Congress (CLC) that provide the majority of these educational opportunities. Unions in Saskatchewan, for example, depend to a great

¹ See Spencer, 1994 and 1998b for a discussion of the distinctions between tools, issues, and labour studies courses.

degree on the Saskatchewan Federation of Labour (SFL) and the CLC Prairie Region for schools and events, including a school specifically for union women and a special conference on training to meet workers' needs for tomorrow.

Educational events of this nature range from modest one- or two-day affairs to weeklong functions. An example of an even longer event is the CLC Prairie Region's annual school held over 4 weeks in January and early February, with an average of 12 courses offered each week. The school's reputation has developed to the point that individual unions now compete to sponsor some of their own courses in conjunction with it, as a way of capitalizing on the networking opportunities and sense of union solidarity it fosters. Other regions provide similar schools, but it is important to recognize that although the organizers of such schools like to concentrate resources on broader issues courses, developed in response to challenges unions currently face, these schools' course offerings can range from tools, to issues, to labour studies type courses. Small unions which lack the resources to develop their own courses tend to find the tools courses these schools offer of great value. We have documented many such educational events and supporting activities. For example, many unions bring their stewards and officers together for refreshers, updates, and/or one-day (or longer) conferences to discuss specific topics, such as new legislation or government policy.

The most intensive and advanced labour education experience is the 4-week (formerly 8-week) *Labour College of Canada Residential Program*, offered annually by the CLC at the University of Ottawa. This school is regarded as the pinnacle of Canadian trade union labour education, and students are selected on a wide range of criteria, such as prior completion of a large number of union and/or labour central courses. Union activity, experiences, and a certain level of competency are also canvassed. A close second, in terms of intensity and level of socioeconomic critique, is the Canadian Autoworkers (CAW) and Postal Workers (CUPW) 4-week, residential membership education courses (see Spencer, 1994).

Literature and Readings

Unions and other organizations offering labour education usually publish course materials that students can continue to use after they leave the course. Firstly, those who enroll in courses typically receive a kit and a handbook—for example, a steward's manual or a table officers' handbook. These materials are often supplemented with intermittent publications intended to further advance training and to keep stewards, officers, and

activists abreast of developments and critically aware of social policy issues. Thus, education (learning) is an on-going activity for these lay representatives.

As part of our study, we are collecting a representative sample of course readings and literature. For example, course materials the CAW provides to attendees of its Intensive Basic Leadership Program include the Ontario Labour Relations Board rules of procedure; an analysis of Bill 7; a report on human rights in Columbia; and a report on labour unions in Columbia produced by a Canadian trade union delegation. The program is offered to leading CAW members at the union's Family Education Centre in Port Elgin, as part of the CAW Paid Educational Leave initiative.

Participants and Measures of Success

Who Participates in Labour Education?

The measure of these courses is their degree of success in preparing members and activists to deal with the concrete exigencies of their workplace, their union, and their community. The proof of steward training, as far as the unions are concerned, is not measured in terms of some external standard of competence, but in terms of a steward's demonstrated ability to handle grievance and arbitration cases.

As a consequence, access to steward training courses is usually restricted to those who have met certain prerequisites, usually related to this type of work or activity; these can be formal or informal. For example, before attending a steward's training course, a union member may be required to attend other preparatory courses. Or entrance to steward training may be restricted to those who have "proven" their commitment to the union in any one of a number of ways, such as regular attendance of meetings, volunteer work, or picket-line duty. The Public Service Alliance of Canada (PSAC), for example, provides "prerequisites" for registrants in its Steward Advanced Training Program (SATP) in the following way:

A potential candidate for SATP is a steward or chief steward who has demonstrated the potential as organizer and problem-solver at the workplace by applying the basic knowledge and skills acquired on BUS [the basic course], and needs to enhance that knowledge and those skills. One who requires the competence and confidence to carry out the practical work of the local and has demonstrated initiatives in making the union a more effective force in the workplace in the areas of representation, motivation, communication and organization. And finally one who has a proven interest in and commitment to the basic

premise of trade unionism, which is summarized as "people helping people."

Who Delivers Labour Education?

During the period spanning the late 1970s and early 1990s, there was a "back to the locals" movement in the delivery of labour education. This stemmed from a desire to replace staff representatives (the traditional deliverers of education courses) with rank-and-file instructors. Coincidentally (and perhaps by way of explanation), these years are generally recognized as a time of retrenchment in the Canadian labour movement, as unions struggled to adapt to changing circumstances imposed by restructuring of the workplace and work process, globalization, new management techniques, and unfriendly governments. Moreover, an emergent rhetoric supported a style of education delivered by members rather than paid staff, with an emphasis on popular educational techniques, including peer tutoring and student-identified problems. In Canada, the United Steelworkers have been prime exponents of this style, as the following statement from their *Program Guide* attests:

All U.S.W.A. courses were designed to be immediately and practically useful to students. To this end each course was developed jointly by the U.S.W.A. Education Department and local union members with knowledge and experience in the specific office or activity covered by the course. The instructors of the courses are also local union members, chosen for their expertise and educational skills.

Just as those who attend steward-training courses must meet certain prerequisites, so must those who teach them. Again, the prerequisites are a mixture of formal and informal requirements. Instructors may have to attend certain union-run educational programs to prepare them for teaching, or may be required to have served as a steward for a number of years. In addition, those who teach or attend steward training courses tend to be those who are acknowledged (either by union leadership or the membership) to possess the skills and desire to achieve success. Such skills include such things as experience in the "line-of-fire," "street smarts," practical wisdom, and political "savvy."

Whether offered by union staff or members, courses are most often taught in a participatory, "hands-on" manner to reinforce their practicality. Students are shown and required to handle the materials and to experience the situations for which a course is training them. They are also presented with case studies of actual situations to improve their understanding of the *dos* and *don'ts* of a specific task. All courses are taught in a student-centred

manner, to encourage students to speak frankly, to ask questions, and to engage in discussions. This allows students to influence the direction and emphasis of a course.

This movement toward peer instructors has by no means resulted in a simplistic approach to labour education—that is, labour education is not member-delivered or controlled without reference to broader union goals (see Spencer, 1992a, 1992b for a discussion of some of the problems associated with this mis-reading of student-centred, Freirian, and populist labour education approaches). Today, in every major union or labour central, education is designated as the responsibility of a staff specialist or full-time officer, who is most often extensively qualified to carry out these duties, by virtue of a combination of formal education and experience. For example, educators of this description were the primary interviewees in this project.

These two tendencies (student-centred, broader union-controlled) have resulted in a variety of labour education delivery styles or protocols that now constitute a continuum. At one end of this continuum are, for example, unions such as the United Steelworkers, who insist on education provided primarily by the rank-and-file; on the other end are unions such as CUPE, in which specialists deliver the majority of courses. In between, unions such as the Saskatchewan Government Employees Union deliver courses through an educational officer but rank-and-file members are responsible for facilitating such things as group discussions.

A few other observations may be made here. There is considerable emphasis on instructor training for both staff and the rank-and-file. This emphasis is evident in most large unions. Even where rank-and-file members deliver courses, they do so under the supervision or direction of specialists. The Public Service Alliance of Canada, for example, has a member instructor program which

consists of training members who are interested in acting as instructors within their locals....The trained members are asked to organize educational and training activities within their locals, and set up local education committees. They are sometimes asked to use this experience during union conferences or courses offered by Regional Offices.

Several unions take this a step further. For example, although the International Association of Machinists deliver first level courses at the regional level, the bulk of their higher level training takes place at a training centre outside the country (Placid Harbor, Maryland, USA), where selected stewards and officers take courses on topics ranging from leadership and

collective bargaining issues to strategic planning and train-the-trainer methodology.

Objectives and Criteria of Success

Objectives for the courses and programs were provided by the unions and centrals canvassed in this project. These objectives reflect both the broad mission (constitutional aims) of the union movement and the broad affective domain of learning (e.g., feelings of union solidarity). A prevailing theme in these objectives is the concrete demands stewards, officers, and other members face in the workplace, their union, and the community. Steward training is not only the central pillar of most union educational programs, but also a microcosm of labour education in general. The vast majority of union courses do not attempt or profess to produce a "steward-in-general"; rather they seek to train *specific* union stewards (although one can argue that stewards-in-general is exactly what some Federation-run schools aim at because they take stewards from many different unions into one classroom). Great care must be taken, therefore, to avoid evaluating stewards' or any other union courses against some external standard of "training-in-general."

We are presently considering whether it may be useful to focus on a single, exemplary steward training course in the advanced stages of this project—possibly one of the more fully developed, tested, and documented courses in order to gain greater familiarity with the many indicators unions use to gauge success. Once identified, such indicators may help construct a schema that can serve as a touchstone against which steward and other training courses can be compared and gauged. This schema will not remain static, however. Whenever new criteria that contribute to the successful preparation of shop stewards are identified, they will be incorporated into the schema. In this manner, we hope to construct a matrix comprised of the many criteria that are used to gauge the success of shop steward and other training courses. This matrix will be induced from existing best practices, rather than deduced from external standards of educational performance.

Gauging our own success in achieving these objectives is yet another matter. The measure of union courses (that is, the immanent standards of competence unions apply to gauge success) are often far from explicit but are, nonetheless, present in all cases. Written statements of intent, for instance, occur in a variety of documents and sources (e.g., constitutions, policy papers, resolutions, etc.). For example, the Education Policy of the Alberta Union of Provincial Employees specifies how a union steward trained in handling grievances is expected to perform his or her roles within

the unionized work environment. A search for these standards or criteria forms part of the mission of the current phase of our ongoing research project and will be the subject of a future article. Where they cannot be found in written form, they will be adduced through interviews and observation of specific educational experiences.

Reflections on Labour Education and PLAR

Labour education in Canada prepares members and activists to better participate in union and community affairs. It is neither the desire nor intent of the union movement to provide its members with formal qualifications or vocational skills when undertaking labour education courses. (Of course, some unions are directly involved in vocational training, outside or alongside of the unions' labour education program). Nonetheless great numbers of union members are learning a variety of skills and being introduced to knowledge that is in many cases transferable to the formal education system. It is our view that much labour education and the learning associated with union activity is deserving of recognition within the formal system.

The length and scope of this article precludes the possibility of locating Canadian developments in an international setting (see Spencer, 1998a, for that discussion). It is worth noting, however, that a number of Canadian initiatives are contributing to a new international definition of labour education. The Canadian use of union members as instructors is being examined by US unions; the CAW/CUPW PEL programs provide a new model approach to membership education; and CUPE's SoliNet experiments with on-line learning (Taylor, 1996) provides another novel approach to labour education. Canadian labour education seems ready and waiting to face the challenges presented by the turn of the century.

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Appendices

Appendix A: Learning Labour, A PLAR Project

A project team at Athabasca University is investigating the learning that takes place within labour organizations. The research is part of the New Approaches to Lifelong Learning (NALL) network, coordinated at the Ontario Institute for Studies in Education (OISE) of the University of Toronto. The project is currently in the 3rd year of its 4-year mandate. The intention of the research is to recognize the non-formal and informal learning associated with activity in labour unions and to relate that learning to credits within the formal educational system, in particular to labour studies and labour relations courses in colleges and universities.

Labour education spans a range of tools, issues, and labour studies courses which have few linkages to college and university credit courses. In addition to labour education for activists and representatives, a range of other workplace-based courses for members—ranging across basic education and language training, health and safety, and vocational issues—may also be investigated.

A further area of inquiry will be the informal learning associated with union activity such as knowledge about running meetings, advocacy, representation, leadership and democratic processes, and the insights gained into understanding concepts such as "incorporation" and "independence" as they apply to labour

relations. The intention is to achieve a very practical outcome: a schema suggesting a method of linking “learning labour” to college and university credits. This would act as an encouragement to working people to engage in credit courses which may benefit themselves and their organizations. It would grant credit (a form of advanced standing) which acknowledges that what they have learned from their experience and from their labour education is valuable, important knowledge recognized as such by the academy.

The project relies on co-operation from individual unions and labour centrals. Many unions at provincial and national level have co-operated in this research. The project could also be linked to the work of the Labour College of Canada and the new Canadian Labour Congress training initiative. Data are being collected from all participating unions—such as the range, nature, and duration of labour education courses and programs and to informal learning within those organizations. Other information is being gathered from colleges and universities which offer labour studies and labour relations courses. Eventually a matrix or schema will be suggested for linking learning labour to credit. This schema will be discussed with all the participants.

Appendix B: Typical Example of Courses Offered for Steward Training

Level 1	Contract Interpretation
Why Unions?	Handling Disciplinary Action
Labour's Structure	What if the Grievor Won't Sign the
Anti-Union/Anti-Worker Myths	Grievance?
The Steward's Role	Handling Grievances
The Tools to do the Job	Presenting the Grievance
What's a Grievance?	Each Grievance Stands on It's Own
Types of Grievances	Merits
Investigating the Grievance	A Steward's Checklist for Dealing
Handling Grievances	with Supervisors
Presenting the Grievance	When to Bring a Grievor into a
Writing the Grievance	Grievance Meeting
Issues to Consider	Management's Reply
Level 2	What to Remember When Talking to
Investigating the Grievance	Union Members
Checklist for Grievance Investigation	

Appendix C: Typical Example of Range of Union Courses

Leadership	Grievance Handling—Step 1 and
Basic Shop Stewards	Step 2
Advanced Shop Stewards	Facing Management
Local Officers' Training (2 Modules)	Role of Shop Stewards in Effective
Activist Training	Handling of Harassment
Assertive Communication in the	Complaints
Workplace—Part 1 and Part 2	Equality Courses: Valuing Our
	Diversity

Equality Courses: Employment Equity	Union Men and Women Talking Assistance, Education & Effectiveness Training for College Board & Education Council Members
Sexual Harassment in the Workplace	
Stopping Sexual Harassment in the Workplace	
Effective Workplace Communication with Persons with Disabilities	How to Run an Effective Committee
Trade Union Activists Travelling Alone	Parliamentary Procedure & Public Speaking
A Balancing Act (Sandwich Generation)	Telework
Without Fear (Fighting Violence Against Women)	Master Agreement Union and Management Joint Training Program—Steward and Manager Step 2 Designates
Trade Union Women and Aging	

Appendix D: Example of the Layering of Union Educational Programs

Level 1	
New Members/Officers	Asbestos in Workplace
	Breaking Barriers
	Contracting Out/Privatization
Level 2	Introduction to Health and Safety
Stewards/Advanced Stewards	Basic Occupational Health and Safety (OHS)
	Advanced OHS
Level 3	How to Participate in the Labour Movement
Collective Bargaining	Organizing Pay Equity
Part 1—Introduction	Retirement Planning
Part 2—Preparation	Strategies for Equality
Part 3—Research and Statistics	Technological Change
	Women in the Union
Level 4	WHMIS
Specialized Courses	<i>Part 4—Other Courses</i>
<i>Part 1—Intensive Study</i>	Guide to Mergers
Advanced Parliamentary Procedure	Basic Human Relations
Face to Face Communication	Facing Management
Labour Arbitration	Job Evaluation
Public Speaking/Parliamentary Procedure	Pensions/Employee Benefits
<i>Part 2—Role of Unions</i>	Public Relations
Introduction to Economics	TQM
Labour Law	EI and Workers' Compensation
Political Action	Union Counseling
<i>Part 3—Specific Concerns</i>	Union Leadership
Adult Education Techniques	Workplace Stress
AIDS in the Workplace	
Assertiveness Training	