

FORMAL AND INFORMAL UNION EDUCATION IN THE PROMOTION OF UNION DEMOCRACY AND ACTIVISM

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Introduction

In a diversifying labour force, traditional models of unionism find it increasingly difficult to sustain unionism and workplace activism. Excessively bureaucratic forms of unionism have trouble adapting to the growing demands of a varied membership, and increasing reliance must be placed on the workplace level and democratisation of unions if they are to reverse the decline in membership and activism that has generally occurred across industrialised countries. But increased power at the workplace *by* the union, and increased power *within* the union, cannot be exercised by members if they lack the requisite skills and confidence. For this, effective union education and training is essential.

This paper draws on several years of research in Australia by the authors on a range of matters relating to union organising, growth and education to focus on critical issues for union education and training, particularly in relation to workplace delegates (also known in some contexts as workplace representatives or shop stewards). It draws on qualitative research involving focus groups with delegates and quantitative research from five surveys of delegates and organisers over a period of nine years. The key issues we investigate are: what is the relationship between formal and informal union education? In what ways does union training shape delegate activism? What matters most in union education? What aspects of union education succeed, or fail, in achieving union objectives? After referring to the literature and data sources, we discuss key findings under nine headings; in each section we commence with a highlighted, key proposition and follow it with explanation from our data.

Earlier literature

Unions play an important role in enhancing workplace activism through the provision of education and training opportunities for delegates and members. In the current context where some unions, especially in Anglophone countries (Frege & Kelly, 2003), are attempting to transition to an 'organising' approach, the importance of training and education of members has been stressed by a number of authors (Carter & Cooper, 2002; Conrow & Delp, 1999; Cooper, 2001; Crosby, 2002, 2005; Grabelsky & Hurd, 1994; Griffin & Moors, 2004; Kumar & Schenk, 2006). Training refers to the acquisition of skills (such as grievance handling and bargaining) whereas education refers to affecting how members think 'to develop their capacities for critical thinking and strategic analysis over the entire range of issues for working people' (Eisenscher 2001, cited in Kumar & Schenk 2006).

If union delegates and activists are to successfully organise collective action then, under mobilisation theory as articulated by Kelly (1998), they need to be able to highlight injustice, frame a definition of collective interest, successfully attribute blame to employers, legitimise and organise mobilisation and respond to counter-mobilisation by employers; for each of these, to varying degrees, delegates require training in the skills needed to achieve those steps. As Kumar and Schenk (2006) point out, it is widely believed that 'an accelerated

program of education and training of rank and file members is needed to facilitate internal reform and, perhaps more importantly, leadership development'. Some highlight that the changed role of the workplace delegate and the new expectations placed on members can generate resistance, and prevent uptake of the new approach, if reasons behind the changes are not well explained. Others have cautioned, however, that moves to implement an organising approach through a top-down approach of educating members that does not also entail a fundamental realignment of the relationship between members and union officials 'has the potential to simply push union functions downward, burn out activists and possibly see union effectiveness decline further' (Cooper, 2002, p. 135). By this logic, unions would need to ensure that members and activists have to 'own' the new approach (Bronfenbrenner & Hickey, 2004; Fletcher & Hurd, 1998).

This also points to the need for unions to be genuinely democratic institutions if the move to an organising model is to be the most effective. The rhetoric of organising often emphasises democracy and workers 'self organising', but there is no single model of organising embraced by unions and those that exist do not necessarily embrace democratisation (de Turberville, 2004). Moody (2000) identifies a much greater engagement by members with the union when they have genuine control over the tactics and direction that their union is taking, unlike the process that Bramble (1995) was so critical of with Australian unions. It is important for members to have a sense of ownership over the organising strategy being implemented for it to be truly effective (Markowitz, 2000), a point well illustrated in the approach taken by the ACTU in its implementation of an organising strategy to re-introduce unions to the Pilbara (Ellem, 2002, 2003, 2004).

Data sources

Our data come primarily from two studies: the Australian Workplace Industrial Relations Survey (Morehead et al 1997), undertaken in 1995 (AWIRS95) and several components of an ARC-funded study conducted by David Peetz and Barbara Pocock investigating issues of representation and organising within Australian unions – the Representation and Organising Research Project (RORP).

The analysis from AWIRS95 utilises the delegate survey interviews undertaken at 1138 of the 2004 workplaces with 20 or more employees that participated. The RORP study was conducted from 2002-2004 and contained a number of components, including: a survey of 379 organisers from 13 unions, a survey of 2506 delegates from 8 unions, focus groups with 60 delegates from the same 8 unions and interviews with leaders from 13 unions. All but the last of these components is utilised in this paper.

The analyses are complimented at times with previously work undertaken by Peetz, Webb and Jones in 2000 that utilises a survey of 852 delegates from the Finance Sector Union and a follow-up survey in 2001 of 102 of the same delegates who had completed a delegate-training course (see Peetz, Webb & Jones 2002 for details).

Education, tenure and confidence

Union education is more important than tenure for delegates in building activism.

Training boosts delegates' confidence, which is the critical pathway to boosting activism and union success.

It might be thought that the most important thing for delegates to have, is experience in the role itself. Evidence from AWIRS95, RORP delegate survey and the FSU survey indicate that such a position underestimates of the benefits of training.

The AWIRS95 study and the later RORP delegates survey both show that an index of delegate training (based on the number of issues from a predetermined list for which training has been received) is much more significant than the years of experience of a delegate in

explaining either delegates' skill levels (AWIRS95) or levels of confidence to undertake key aspects of their role (RORP delegate survey) – see Table 1.

Based on multivariate analysis, each increase in the AWIRS95 training index (attending one additional course from six considered) had an equivalent impact on a delegate's skill level equivalent to that resulting from nearly 6 years of experience in the role. More importantly, an ANOVA model showed the interaction between training and experience was not significant, indicating that training impacts equally on the skills of delegates whether they have substantial or little experience. A very similar result was found for the relationship between delegate confidence, training and experience in the RORP delegate survey. Each additional training course attended had the same effect on an index of confidence as 2.6 years of experience as a delegate in a multivariate analysis regressing tenure and training against confidence. Again, a subsequent ANOVA model revealed no interaction relationship between training and tenure, indicating that training is as helpful to new as it is to long-term delegates.

Table 1 Delegate tenure and training on skills

	Skills (AWIRS95)	Confidence (RORP)
Constant	1.460*** (38.74)	3.569*** (135.21)
Tenure (per 5 years)	0.056** (3.16)	0.133*** (9.85)
Training index (per issue)	0.063*** (7.18)	0.086*** (13.85)
R ²	0.106	0.121
N	1081	2498

Source: AWIRS95 union delegate questionnaire and RORP delegate survey

Notes: The table shows the marginal effect of each variable on the skills index for the units shown in the left hand column. The marginal effects were significant at 1% (**) level and 0.1% (***) level, respectively, with t-statistics shown in parentheses.

To examine the impact of tenure, training and skills or confidence on delegate activism, three measures of activism from each of the AWIRS95 and RORP delegate surveys were regressed against these three variables. Across all three measures of activism in each analysis, the largest and most significant association was the effect of skills (AWIRS95) or confidence (RORP delegate survey). A measure of the number of issues trained on was also highly significant across all measures of activism. The effect of tenure, on the other hand, was much smaller and was only significant in two of three AWIRS95 measures and none of the three RORP delegate survey measures (see Table 2).

Analysis from the RORP delegate survey also indicated that the (delegate assessed) effectiveness of the union in making training *available* was strongly correlated with the activism of its delegates.

Table 2 Delegate activism and tenure, training and skills/confidence

	AWIRS95			RORP		
	Breadth of activism	Depth of activism	(Ln) Union hours	Number of Tasks	Intra-delegate contact	Involvement in union activities
Constant	2.783*** (8.06)	0.913*** (3.93)	-0.157 (-1.55)	1.247*** (9.02)	0.988*** (8.26)	0.808*** (8.20)
Tenure (per 5 years)	0.394*** (4.48)	0.101 (1.09)	0.100*** (3.34)	-0.045# (-1.80)	0.032 (1.50)	0.004 (0.24)
Training (per issue)	0.251*** (4.67)	0.162*** (3.99)	0.060*** (3.84)	0.063*** (7.31)	0.076*** (10.21)	0.072*** (11.79)
Skills/ Confidence (per index unit)	1.737*** (7.33)	0.660*** (4.60)	0.386*** (6.01)	0.689*** (18.91)	0.541*** (17.17)	0.592*** (22.73)
R ²	0.215	0.087	0.115	0.180	0.195	0.292
N	1081	1081	1076	2498	2494	2337

Source: AWIRS95 union delegate questionnaire and RORP delegate survey

Notes: The table shows the marginal effect of each variable for the units shown in the left hand column. For the breadth and depth regressions, the marginal effects are the change in the number of tasks. For the regression of the natural logarithm of union hours, the marginal effect is the percentage change in union hours.
The marginal effects were significant at 10% (#) level and 0.1% (***) level, respectively.
t-statistics shown in parentheses.

A tendency to over-rate the impact of experience was also found amongst organisers in the RORP organisers survey (see Peetz, Pocock, & Houghton, 2007). From a list of 25 factors, organisers rated their experience as the greatest help to them in doing their job. Yet in the analysis, experience was the fourth least important factor out of 25 in explaining the overall difficulty or ease of organisers' work, and was the least important of all (and non-significant) in explaining changes in membership joining.

The results from the AWIRS95 and RORP delegate survey were also consistent with the earlier findings of Peetz, Webb & Jones (2002), who found training significantly increased various measures of activism, whereas tenure's impact was only marginally significant for some measures of activism. That study also found that increasing skills only enhances delegate activism through its effect on confidence – that is, increasing skills without increasing confidence had no benefits for activism. As with RORP and AWIRS95, the impact of training on activism was greater than could be explained simply by improvements in skills and confidence. This perhaps reflects the role of 'education' beyond 'training', with the greater breadth of courses exposing delegates to broader issues affecting workers and to analytical and strategic approaches, possibly enhancing the motivation of participants to effect change.

Quality

Quality matters: better quality training leads to higher confidence and activism

The RORP data indicated that the perceived *usefulness* of training (for those who had undertaken some) was an important aspect of the impact of training on *confidence*, with less

useful training reducing the impact of additional training – a poor rating on the usefulness of training more than offset the positive aspects of training on confidence (see Table 3).

Table 3 Delegate tenure and training on confidence

	Confidence (RORP)	Confidence (RORP)
Constant	3.569*** (135.21)	3.844*** (70.67)
Tenure (per 5 years)	0.133*** (9.85)	0.129*** (8.75)
Training index (per issue)	0.086*** (13.85)	0.058*** (6.30)
Usefulness of training Rating: Not useful (1) to (3)		-0.371*** (-7.51)
Usefulness of training Rating: (4)		-0.118** (-2.90)
Usefulness of training Rating: All useful (5) (ref)		
Usefulness of training Joint F-test (df=2,1537)		28.56***
Adjusted R ²	0.121	0.113
N	2498	1542

Source: RORP delegate survey

Notes: The table shows the marginal effect of each variable on the confidence index for the units shown in the left hand column. The marginal effects were significant at 1% (**) level and 0.1% (***) level, respectively, with t-statistics shown in parentheses.

Expressed in bivariate form, delegates in RORP who rated their training 'very effective' were in the 'high confidence' category (approximately the top third when delegates were ranked according to confidence) 46 per cent of the time, compared to 33 per cent of those who rated the training 'somewhat effective' or lower. Similarly, 32 per cent of delegates who rated their training very effective were in the high activism category (compared to 25 per cent of the rest), and 52 per cent of delegates who rated their training very effective were in a high 'local union power' category (based on an index of responses to four questions) compared to 33 per cent of the rest.

Delegate education and training has an effect on confidence over and above the skills that are actually taught. Good training provides delegates with ideas, motivates them and inspires them and gives them a sense of collective identity and power. It also gives them a space and opportunity to reflect on their world – understand it better and consider how they can act to change it.

Reverse causality?

The patterns shown here are not simply the effects of reverse causality: while delegates who are inclined towards activism are more likely to seek training, the training they receive will have an independent effect in boosting delegate confidence and activism.

A common reaction amongst some union officials when we have presented the above data is that it really just reflects reverse causality – individuals who are more activist are simply more likely to choose to take training. But this is only part of the story. We accept that

activists are more likely to seek training. But in unions, training is not just driven by demand. It is also driven by supply – what the union provides, to how many, how often and how well.

If reverse causality dominated, and training had no impact on activism, then the quality of training would also have no independent impact on outcomes. Yet we have just seen that the quality of training of training significantly affects confidence, activism and power. We can also test the reverse causality hypothesis another way – by examining people who we can identify as being more motivated towards activism. Our proxy for this is people who are activists outside the union – people who hold an activism position in a social group, community association or other external body other than the union, accounting for 13 per cent of our delegates in RORP. They are likely to have attitudes and experiences that facilitate them being activist independent of becoming a delegate. If reverse causality explained our earlier findings, then this group (we call them ‘community activists’) would be more likely to be trained, but training would not affect their activism or local union power. Untrained delegates who were community activists would be more activist in the union than trained delegates who were not community activists.

It is true that community activists were more likely to be trained than other (‘union-only’) activists. Yet amongst delegates *without* training, we found that community activists were no more activist in the workplace than union-only delegates – in both categories, only 14 per cent of delegates could be classified in the ‘high activism’ category. Amongst community activists who had received training, however, 37 per cent were in the ‘high activism’ category. Amongst ‘union-only’ delegates who had been trained, 26 per cent were classified as having ‘high activism’. This is higher than activism amongst untrained community activists, and is the reverse of what would be predicted under the reverse causality hypothesis. The higher level of union activism amongst community activists only occurred amongst those who had been trained. The benefits of training were even greater amongst community activists than amongst union-only activists. But without training, the greater potential for activism that is brought to the union by people with outside activist experience is lost.

Similarly, community activist delegates who were untrained reported no higher perceived local union power than did other untrained delegates, but training led to greater perceived power amongst both groups, with the increase greater for community activists.

Breadth and content of training

Delegate activism will be influenced by both the breadth of training (the quantity) and the specific type of training. In particular, training in a broad range of skills associated with building member power (such as training in campaigning and developing networks) will do more over the long run to build membership growth and success than training in recruitment alone.

The training issues most associated with delegate activism were training in enterprise bargaining, developing union networks and structures and campaigning skills (Table 4). Interestingly, these last two were the training issues least likely to have been undertaken by delegates even though they were most strongly associated with activism. Also of interest was the result that 2 in 5 delegates had not undertaken training on any of the 10 issues asked about.

Table 4 Correlation between delegate activism and undertaking training on particular issues

Issue	Training undertaken	Number of tasks	Intra-delegate contact	Involvement in union activities
	%	ρ	ρ	ρ
Training index	NA	0.249***	0.304***	0.359***
General introductory training	49.2	0.184***	0.219***	0.268***
Recruitment techniques	37.7	0.184***	0.213***	0.248***
Promoting activism and involvement by members	36.8	0.191***	0.224***	0.281***
Communication skills	36.3	0.146***	0.236***	0.231***
Grievance resolution	34.7	0.181***	0.213***	0.248***
Enterprise bargaining	34.4	0.193***	0.269***	0.309***
Occupational health and safety	33.3	0.170***	0.183***	0.220***
Managing meetings	30.6	0.179***	0.218***	0.230***
Developing union networks and structures	30.2	0.191***	0.238***	0.269***
Campaigning skills	28.8	0.227***	0.257***	0.292***
None	42.1	-0.216***	-0.245***	-0.311***

Source: RORP delegate survey

Notes: *** Significant at the 0.1 per cent level

The AWIRS95 study asked about training on a similar but different range of issues but the clear standout associations with activism were negotiating workplace agreements and developing general negotiation/consultation skills (Table 5).

Interestingly, the proportion of delegates without any training was lower than the more recent RORP study (at just over a third).

In RORP, delegates who had received training in enterprise bargaining skills and campaigning skills reported more union power. There was no difference in union power when delegates received introductory training, generic training (such as in communication skills, managing meetings) or training in recruitment techniques. Training in these areas has the greatest impact on whether delegates feel confident that they can perform their role.

Successful *recruitment* behaviour depends on developing *confidence* and skills across a range of delegate competencies, not just in relation to recruitment skills. In RORP, success in recruiting someone to the union within the previous six months correlated significantly, as one would expect, with having been trained in recruitment techniques ($r=.13$), but the correlation of success was even stronger with overall confidence (.21) and with each of its components – confidence in answering queries from members (.16), participating in a meeting of delegates (.18) and being involved in a workplace campaign (.17). It also

correlated more strongly with the index of local union power ($r=.18$). In the FSU survey, confidence in 'approaching a colleague about becoming a member' was also measured but it did not correlate as strongly with recruitment success as did confidence in participating in a delegates meeting; an overall confidence index was a stronger predictor again.

Table 5 Correlation between delegate activism and undertaking training on particular issues

Issue	Training undertaken	Breadth of activism	Depth of activism	(In) Delegate hours
	%	ρ	ρ	ρ
Training index	NA	0.311***	0.241***	0.233***
Union rules and structures	48.0	0.188***	0.172***	0.135***
Developing general negotiation/consultation skills	45.2	0.275***	0.219***	0.221***
Negotiating workplace agreements	37.5	0.379***	0.222***	0.247***
Occupational health and safety	30.2	0.195***	0.127***	0.169***
Equal employment opportunity/affirmative action	25.2	0.166***	0.167***	0.133***
Sexual and racial harassment	22.6	0.157***	0.143***	0.105***
Recruitment skills	19.9	0.157***	0.172***	0.126***
None of the above (no training)	35.2	-0.255***	-0.177***	-0.193***

Source: AWIRS95 main survey

These findings do not necessarily imply that only delegates trained across a range of skills should recruit. However, to persuade people to join, unions need to be able to demonstrate power within the workplace. That does not come simply from training people in recruitment.

Diversity and specialisation

Training policy needs to recognise that delegates have different personalities and capabilities, and not all delegates are suited to becoming successful recruiters. Training within a workplace needs to encompass enough delegates or activists to enable specialisation where necessary in tasks such as recruitment amongst trained delegates or activists.

As just indicated, we do not argue that only delegates trained across a range of skills should recruit. Some delegates may not like recruiting – there may be others who enjoy it more. Based on the delegate focus groups (Clarke, Pocock, & Peetz, 2005), delegates thought it was important to recognise the different skills people had, and that, for example, not everyone was comfortable with recruiting, but some are excellent at it. One delegate, Fred, said

There's more delegates in our department so we tried to split up different roles with those delegates...One delegate was really good at recruiting so she did the recruiting stuff as well as the ancillary stuff, but her role was just basically recruiting. If somebody has got a natural ability to do something, well you would be crazy if you didn't foster that, assuming they're happy to do it of course...Some delegates just don't like going up to somebody they don't know and saying, 'I'm a union delegate and have you thought about joining', et cetera et cetera. That's out of a lot of people's

comfort zones. I must admit it was out of mine at the time, especially if that individual is totally opposite to perhaps yourself, or you have met them and you had a personality clash or whatever.

This supports the view that union work needs to be undertaken by many, rather than few, and that recruiting is easier when it is 'like to like', rather than when delegates are required to recruit where there are personality clashes involved. In one focus group delegates who were highly active were nevertheless quite hostile to the suggestion that they recruit, including Anna:

I don't see my job as a delegate as recruiting staff members, I truly don't. Because I work full time and I have a very high teaching load. Anything I do for the union I'm doing it in my time, and I'm more than happy to do it, but that takes a huge amount of time...And, quite frankly, I just don't have time to recruit. I see my role very much so as supporting the staff members and union members.

In this focus group another delegate, Margie indicated that while she felt uncomfortable recruiting, a different delegate in her workplace saw herself as the 'membership officer':

We do have one rep who really likes sidling up to people and say, 'What about joining', or whatever. And she likes to do that, fair enough, I leave it to her. She's got her hit list and she moves down them.

It is interesting that in a number of cases delegates were not recruiters but could identify someone who did this job in their workplace and did it well. Perhaps this is simply an example of specialisation – the recruiters were able to do union work on the job but less likely to be able to attend meetings held out of hours or away from the workplace, or are happy talking to individuals about joining the union but less interested in participating in group processes. Of course some delegates were recruiting.

The strength of views about the different union tasks at a workplace level suggests that unions need to acknowledge the very different skills, knowledge and attributes that people bring to the role of delegate and, particularly in larger workplaces, consider promoting the specialisation of roles, or at least supporting delegates in the different roles they naturally take up. Thus whilst recruiting is critical to the union movement, and appropriate training and support is important for all delegates, *no matter how much training they receive, some people feel very uncomfortable performing this role.* It might be more useful for these people to find a recruiter in their workplace and focus themselves on the areas that they feel comfortable in.

Follow-up

There is little point in formal training of delegates if there is not follow-up to their training. Post-training contact with organisers is strongly related to commitment and hence activism

The survey of FSU delegates showed that an important time for contact between delegates and organisers is after training. Delegates who received follow-up contact from organisers after training were more likely to show an increase in union commitment. And the more frequent the contact, the greater the increase in commitment. Amongst those with post-training contact with their organiser, 38 per cent now felt more committed to the union, only 16 per cent less committed. Amongst those without post-training contact, 44 per cent felt less committed – and 67 per cent believed they were 'not involved' in the union. Delegates with higher commitment levels had higher activism levels.

The delegate focus groups also observed that building in 'debrief time' through campaigns and negotiations would provide a chance for delegates to reflect on their experiences and

improve their confidence. Delegates also reported that they learn a lot during periods of intense activity, such as disputes and campaigns. The focus group results indicated benefits from unions building educational strategies into bargaining and campaign plans.

This has important implications for organisers' skills. They need to be provided with the skills, support, and time to mentor delegates as part of their regular workload.

Informal training

Formal training is important, but at least as important is the informal training that happens when organisers train delegates 'on the job'. Organiser mentoring of delegates is critical for activism and power.

The RORP delegate survey reveals how important the additional support that may be provided to delegates can be in building their confidence (Figure 1 and Table 6). The left hand side of Figure 1 shows the relationship between delegate confidence and the proportion of delegates who indicated that received high levels of various forms of contact and support from their organiser or the union office. Delegate confidence was higher where delegates had more contact with their organiser, more contact with other people in the union office and perceived high levels of support from the union office.

The right hand side shows the relationship between delegate confidence and whether they agreed (or strongly agreed) that their organiser had taught them many valuable things and whether the expectations of their role as a delegate were clear to them. High confidence was associated with organiser mentoring of delegates and role clarity amongst delegates.

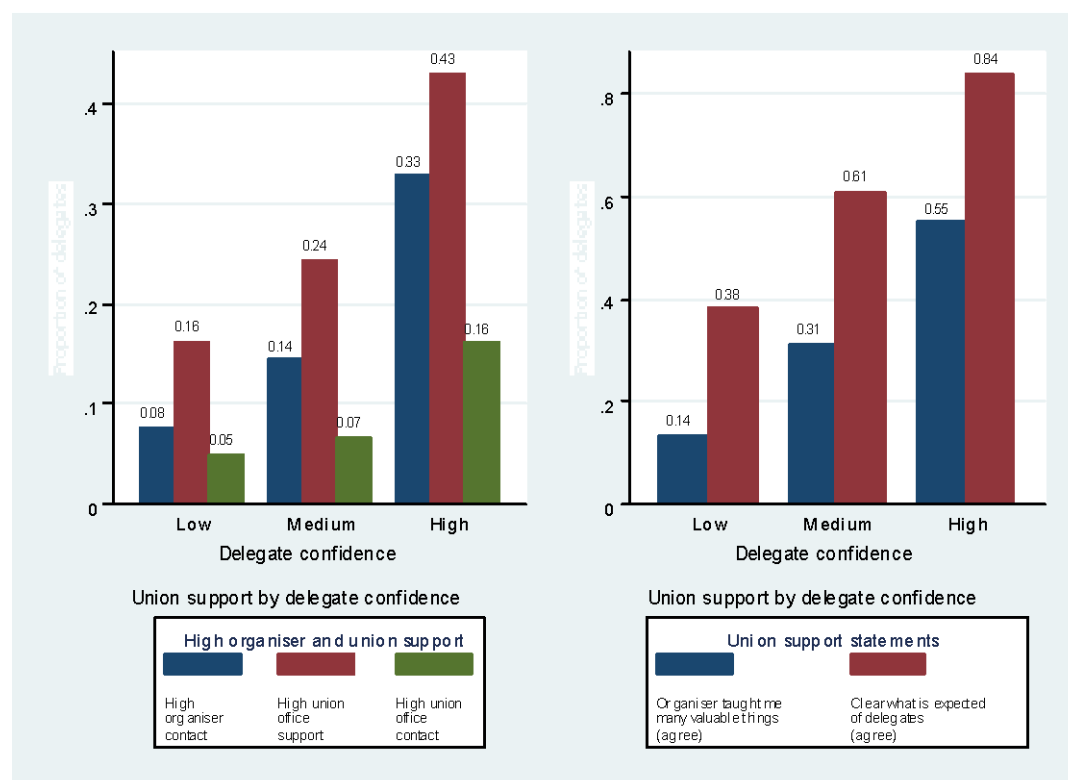


Figure 1 High organiser and union support by delegate confidence

Source: RORP delegate survey

Table 6 (column 1) shows all five relationships in a multivariate regression for confidence, with all five variables highly significant. Organiser mentoring, frequency of contact with the

organiser and the rest of the union office, rating of the union office support and role clarity all increased confidence. Adding in tenure and the training index shown earlier indicates again that training is more effective at building confidence than experience alone (column 2). However, if the training is not perceived to be effective (column 3) then the impact for training is completely undone, reinforcing one of our earlier propositions.

Not surprisingly, given the relationship between confidence and activism, all of these variables were important in explaining higher levels of delegate activism across all measures, particularly union mentoring and role clarity.

Table 6 Union contact and support, mentoring, role clarity, tenure and training issues on delegate confidence

	Confidence (RORP)	Confidence (RORP)	Confidence (RORP)
Constant	3.321*** (109.71)	3.182*** (97.82)	3.381*** (51.37)
Organiser contact (high)	0.291*** (7.52)	0.246*** (6.41)	0.222*** (5.50)
Union office support (high)	0.146*** (4.27)	0.124*** (3.71)	0.084* (2.21)
Union office contact (high)	0.184*** (3.70)	0.138** (2.83)	0.149** (2.88)
Organiser mentoring (agree)	0.236*** (6.97)	0.199*** (5.90)	0.181*** (4.76)
Role clarity (agree)	0.543*** (14.99)	0.468*** (12.91)	0.399*** (8.57)
Tenure (per 5 years)		0.101*** (7.87)	0.103*** (7.30)
Training index (per issue)		0.038*** (6.02)	0.034*** (3.30)
Usefulness of training Rating: Not useful (1) to (3)§			-0.216*** (-4.34)
Usefulness of training Rating: (4) §			-0.093* (-2.36)
Usefulness of training Joint F-test (df=2,1434)			9.44***
Adjusted R ²	0.228	0.263	0.239
N	2309	2305	1444

Source: RORP delegate survey

Notes: The table shows the marginal effect of each variable on the confidence index for the units shown in the left hand column. The marginal effects were significant at 5% (*) level, 1% (**) level and 0.1% (***) levels.

t-statistics shown in parentheses.

§ Reference group for this variable is 5 (very useful)

Discussions with delegates in the focus groups revealed that, especially for experienced delegates, learning on the job was the most powerful form of learning. They cited participation in a dispute as their most effective form of learning. This was particularly so when they had a good mentor in their organiser or other delegates. Said Brian:

I've received some training here or workshops on being a delegate of the union and organising and that's been good. And also having disputes is good. The more trouble you get in, the better training you get, because you see how things work I didn't know what to expect. Now I do, because I've been that many times and so, yeah, the more trouble you get into and the more you jump in and do, the better you're experienced.

Delegates value organisers who spend time developing delegates' understanding and skills. Several delegates made comments such as these by Jenifer:

I think the biggest thing for me was not only training but to have a mentor That way, if you were going to a meeting or something, you had someone ringing up saying, 'Look, I'm going to this and I've got to represent them. Is there really anything that I've got to know, because I've never done it before?' And for a lot of people it's a first time thing and you're thrown in the deep end.

Delegates from a manufacturing union discussed the benefits of integrating informal and formal education:

Jim: Even if you have a mass meeting, it's good to have an organiser there, seeing how he addresses the meeting, how he gets people over, you know, gets them fired up. You learn from that. You can observe—

Mike: It's like an apprentice and a tradesman isn't it? ... You learn off the bloke that knows more.

Ali: Yeah, and then when you come to courses like this as well, it sort of reinforces it, it helps.

Ellie: Yeah, you learn more on the floor, experiencing it, and then you come here. You've got some information to improve it.

Delegate satisfaction and efficacy

Training means delegates do more things and more difficult things. But it also makes them more satisfied with being a delegate.

In RORP, delegates who had been trained were more likely than untrained delegates to say that the range of tasks they did had widened over the preceding two years (48 per cent of trained said this, versus 32 per cent of untrained delegates). Trained delegates were also more likely to say that their role had become more difficult (33 per cent versus 26 per cent amongst untrained delegates). However, trained delegates were much more likely to say that they were more satisfied with being a delegate than two years earlier (31 per cent versus 19 per cent) and to agree that they enjoyed being a delegate (73 per cent versus 51 per cent). They also were more likely to demonstrate efficacy (Bandura, 1997) through believing that they could really make a difference at their workplace (73 per cent versus 56 per cent).

Union democracy

Effective union training is closely related to effective union democracy

The RORP delegates survey showed positive correlations between almost all indicators of training, and each of three measures of democracy (Table 7).

Table 7 Correlations of union training and union democracy

	Delegates have a lot of influence in this union	In an enterprise bargaining campaign, members here have a lot of say in determining the content of the claim	There is not enough consultation with members before decisions are made by this union (reverse coded)
<i>Training in...</i>			
Enterprise bargaining	0.193***	0.198***	0.006
Promoting activism	0.189***	0.124***	0.031
Campaigning skills	0.188***	0.144***	0.051*
Communication skills	0.180***	0.111***	0.000
Grievance resolution	0.177***	0.111***	0.042*
Recruitment techniques	0.170***	0.121***	0.054**
Introductory	0.169***	0.090***	0.023
Developing networks	0.161***	0.157***	0.027
Managing meetings	0.154***	0.087***	0.002
Occupational health	0.141***	0.095***	0.006
<i>Plus...</i>			
Any delegate training?	0.195***	0.120***	0.025
Overall training usefulness rating	0.159***	0.140***	0.131***
Effective at making training available	0.236***	0.233***	0.155***

Source: RORP delegate survey

This probably reflects relationships in both directions. On the one hand, training increases the ability of delegates to participate in the activities and decisions of the union. Without training, delegates and hence members lack the skills and confidence to shape decisions that affect them. This interpretation is reinforced by the fact that correlations with training are stronger for delegate involvement in decision-making than for member involvement.

On the other hand, democratic unions are more likely to respond to the needs of delegates and members by making training available. Leaders of more autocratically controlled unions may be reluctant to devote resources to an activity that may ultimately challenge their authority by providing delegates and members with the resources and confidence enabling them to participate in union affairs. This interpretation is supported by the fact that the strongest correlation with each democracy indicator, amongst all the training variables, is not individual training measures (whether individual respondents received training, on what issues they received training, or how effective the training was) but the more general issue of how effective the union was in making training available. Less democratic union branches were less likely to be rated by delegates as being effective at making training available.

The inertia of some unions – their slowness in implementing reforms that bring about a more 'organising' approach – can thus be seen as reflecting not just the difficulties of changing cultures and organisational practices because people are used to the old ways of doing things. It can also be seen as resistance to changes that could undermine, and perhaps overturn, existing power relationships within unions. Training and empowerment of delegates and activists creates new power sources within unions. This is not always a comfortable position for those who hold power under existing structures.

Conclusions

The key issues we investigate were: what is the relationship between formal and informal union education? In what ways does union training shape delegate activism? What matters most in union education? What aspects of union education succeed, or fail, in achieving union objectives?

Our data demonstrate several conclusions on the importance and nature of formal education and training. First, union education is more important than tenure for delegates in building activism. Second, training boosts delegates' confidence, which is the critical pathway to boosting activism and union success. Third, quality matters: better quality training leads to higher confidence and activism. However, if the training is seen as not useful to their situation or circumstance then training can be quite detrimental to confidence. We showed, fourth, that the patterns shown here are not simply the effects of reverse causality: while delegates who are inclined towards activism are more likely to seek training, the training they receive will have an independent effect in boosting delegate confidence and activism.

We found that the most critical forms of training for delegate activism are those that build capacity and skills that are consistent with the organising model of union renewal. So our fifth conclusion was that delegate activism will be influenced by both the breadth of training (the quantity) and the specific type of training. In particular, training in a broad range of skills associated with building member power (such as training in campaigning, developing networks, and negotiation and bargaining skills) will do more over the long run to build membership growth and success than training in recruitment alone.

We also found that the integration of education as both formal and informal is of crucial importance to the confidence of delegates— it's not just what happens in the training room, it's what happens afterwards in terms of follow-up, support, role clarity and mentoring that impacts on delegate activism. Thus our sixth conclusion was that training policy needs to recognise that delegates have different personalities and capabilities, and not all delegates are suited to becoming successful recruiters. Training within a workplace needs to encompass enough delegates or activists to enable specialisation where necessary in tasks such as recruitment amongst trained delegates or activists. Seventh, there is little point in formal training of delegates if there is not follow-up to their training. Post-training contact with organisers is strongly related to commitment and hence activism. Eighth, formal training is important, but at least as important is the informal training that happens when organisers train delegates 'on the job'. Organiser mentoring of delegates is critical for activism and power.

Finally, we uncovered some findings about the relationship between delegates and the union. Our ninth conclusion related to delegates as voluntary workers: education and training mean delegates do more things and more difficult things. But they also makes delegates more satisfied with being a delegate, and give them greater enjoyment and efficacy in the job. Our tenth conclusion related to union democracy. Put simply, union education and training is closely related to effective union democracy. The more democratic unions are in terms of providing members and delegates with real influence over the matters that affect them day to day, the more likely they are to be effectively making training available to delegates, the more likely they are to be providing the right type of training and the more likely that the training is seen to be useful.

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