Learning to Organize:
Unions, Work, and Learning

Ellen Scully-Russ
Columbia University, Teachers College

Edward Chiera
Edward Chiera Associates
Abstract
Citing irreconcilable differences over the mission and structure of a post-industrial labor movement, three U.S. unions disaffiliated from the AFL-CIO and, along with four others, founded the Change to Win Coalition to organize American workers. Organizing is now a subject of intense debate in the U.S. labor movement. This paper will explore strategies for making industrial restructuring, including education, and skills an integral part of a new organizing agenda. U.S. unions have built competencies and resources in response to industrial restructuring, including negotiated funds and complex education delivery systems to support lifelong learning. Although workers both need and respond to educational services, providing individual workers with access to education—without engaging them in a democratic learning process about their work, learning, union, industry, and the overall economy—will not restore a balance of power between capital and labor. This paper calls for a new perspective within unions, one that views learning as an integral part of a progressive labor movement devoted to organizing.
Introduction

On July 25, 2005, two of the largest American unions, the 1.8 million-member Service Employees International Union and the 1.3 million member United Brotherhood of Teamsters, disaffiliated from the national AFL-CIO, forming the Change to Win Coalition. The United Food and Commercial Workers (UFCW) quickly followed their lead. Three other unions—The Laborers International Union of North America (LIUNA), UNITE-HERE (a union newly formed from the merger of the former Union of Needletrades, Industrial and Textile Employees and the Hotel Employees and Restaurant Employees International Union), The United Brotherhood of Carpenters and Joiners, and The United Farm Workers—may soon join them. Citing irreconcilable differences over the mission and structure of a post-industrial labor movement, the new Coalition struck out on its own to mobilize American workers. Andrew Stern, the President of SEIU and the initiator of the Change to Win Coalition, claims the decision to disaffiliate is linked to the need for a more effective response to the changing economic landscape…“21st century unions need to be more innovative, dynamic, flexible, and responsive to the needs of American workers and the realities of global employers” (Stern, 2005), p 1). By consolidating union strength, holding unions accountable for results in organizing, and developing new alliances, the Coalition seeks to organize the nine out of ten workers in America who have no union.

Not long ago, the most serious debate in the American labor movement was whether unions should engage management outside of the distributive bargaining process. Because the American political economy has no tradition of social partnership,
unions left management to managers and, instead, engaged in bargaining to mitigate the impact of management decisions on their members. However, the last three decades taught labor leaders the importance of an industrial strategy to guide their unions and help their members navigate this historic period of economic restructuring. Gone are the intense debates about labor’s role in the industrial and work restructuring process. Many unions now employ mature and sophisticated bargaining and political strategies that extend the union influence beyond mandatory subjects of bargaining\(^1\) into day-to-day operations of firms, and the strategic business decisions that make a material difference for workers in today’s economy.

Recently, many American labor leaders and workers have realized that bargaining and political action, although necessary, are not sufficient to provide workers with the security they seek. Economic and workplace restructuring must also become an integral part of labor’s organizing agenda. How labor broadens its organizing agenda to help workers confront these issues is now the subject of the controversial debate which has partly led to the tragic split within the American Labor Movement.

This paper will explore new strategies for making economic and workplace restructuring—including education, training, and skills—an integral part of a new organizing agenda. By tracing the history of U.S. labor and industrial relations, the authors will suggest that the current debate in labor on organizing reflects fundamental beliefs about power and solidarity that evolved throughout labor’s history in modern mass industrial economy. American unions, like the economic system from which they emerged, adopted many of the basic values and measures of success of modern mass

\(^1\)The U.S. National Labor Relations Act requires unions and employers to bargain wages, hours, and other conditions of employment. The parties must mutually agree to negotiate over issues that fall outside the
production (Bluestone & Bluestone, 1992; Marshall & Tucker, 1992). Mass organizing became an effective route to amassing power. By mobilizing a critical mass, social movements could apply political pressure to change formal institutions, like government and industry. The more organized the masses, the greater their chance of achieving goals (Finger, 1989). This strategy worked for American labor in the industrial era. Although unions never represented more than one-third of the total workforce, a critical mass of organized workers in key industries enabled unions to raise the standard of living for all American workers (Bluestone & Bluestone, 1992).

However, as size and mass organization yields to other sources of power and influence in the new political economy, labor’s traditional sources of power will continue to wane. Instead of debating how to organize a critical mass of workers, the authors argue that American unions need to organize a new critical dialogue that allows union leaders, union members, and all workers to critically reflect on their experiences in the new economy, build a new vision of work and community, and generate new strategies and forms of power to realize their individual and collective visions for the future.

Unions have built both competencies and capacity in representing workers affected by industrial restructuring. Included in this capacity are negotiated funds and complex education and training delivery systems to support lifelong learning (Van Buren, 2003). The educators who manage these resources have long sought to align their programs with union organizing initiatives (Harris, 2000). However, with a few notable exceptions, their efforts have fallen short. The authors will argue that these efforts have not proven successful because their strategy—to graft education and training programs onto organizing campaigns—is simply servicing, not organizing. Although workers both

---

scope of these mandatory subjects of bargaining.
need and respond to educational services, providing individual workers only with access to education—without engaging them in a collective learning process about their work, learning, union, employer, industry, and the economy—will not mobilize labor and restore a balance of power between capital and labor in the U.S.

This paper calls for a new perspective within unions that views learning as an integral part of a progressive labor movement devoted to organizing workers. Union leaders need to reframe their view of their role in the economy, as well as broaden their view of organizing to include a vision for democratic learning, education, and training within unions. Union educators and training practicioners also need to reframe their perspectives on their role in labor movement. Working together, union leaders and educators may discover ways to leverage the knowledge and resources gained from bargaining and restructuring to reach out to and organize new workers.

The first section of the paper traces the evolution of the U.S. system of industrial and labor relations and labor’s role in workplace and industrial restructuring, and occupational education and training. This discussion will not only describe the traditional union service model so prevalent in today’s unions’ education and training programs; it will also suggest that this model was inevitable given the context of American labor relations from which it emerged.

The second section articulates the characteristics of a new approach to organizing, predicated on critical reflection, learning, and community building; the authors argue this is more aligned with the needs of workers in today’s economy. We also suggest how to mobilize existing education and training resources to support this new organizing agenda.
Included are several examples of this approach. The paper concludes with a brief
discussion of implications for union leaders and educators.

The Historic Context: U.S. Industrial Relations, Work, and Learning

U.S. Industrial Relations

The context for American industrial and labor relations has been significantly
altered by political, social, technological, and economic trends (Appelbaum, Bernhardt,
& Murnane, 2003; Bernhardt, Morris, Handcock, & Scott, 2001; Cappelli, 1999) yet the
legal and political pillars upon which these relations stand remain fixed in another era.
Labor’s traditional role in the U.S. is to represent workers’ interests. Representation has
become equated with collective bargaining, protecting workers’ interests, and providing
services to union members. Contract negotiations, political action, and benefits
administration have all become central components of labor’s basic mission.

The framework of American industrial relations and labor’s prevailing roles
within it have evolved over a series of hard-fought battles and compromises that
eventually established labor peace and fueled American economic growth and prosperity
(Kochan, Katz, & McKersie, 1986). Two years prior to America’s commitment of troops
in World War II, nearly one in ten Americans were out of work. In the first three years of
America’s involvement in the war, the U.S. government invested over $350 billion on the
war effort, allowing nearly every American who wanted a job to find work. After the
war, the U.S. economic expansion and job growth continued, now fueled by rising wages
and pent-up consumer spending (Bluestone & Bluestone, 1992).

However, the quid-pro-quo for government’s investment in the U.S. industrial
complex was labor peace. President Franklin D. Roosevelt enacted the National Labor
Relations Act which forged a new workplace compact that recognized both management’s right to run the company and workers’ rights to form a union and bargain over wages and benefits. This new labor relations model gave management the full power to manage and paved the way for a new highly efficient mass production work system based on Fredrick Taylor’s theory of scientific management. It also gave raise to a new form of service unionism, where union power is in part, based on leaders’ ability to deliver benefits and services to union members. Together, these two systems, Taylorism, and service unionism, fostered the paradigm of industrial worker education and training that underlies many union-sponsored vocational programs today.

Taylorism

Taylor believed that efficiency and control could be established over a production process if scientific methods were used to rationalize work processes. Management gathers and classifies worker knowledge about the work, then reduces this information to a set of rules that govern the design of an efficient, productive work process. Every worker’s job is thus extracted to a set of discrete tasks that delineate both what is to be done and how it is to be executed. The objective is to remove all individual thought and discretion from work to ensure that each task is performed identically and routinely (Bluestone & Bluestone, 1993). By rationalizing each job, the entire work process becomes mechanized and coordinated. With the aid from Taylor, management built large manufacturing processes resulting in enormous cost savings, large productivity gains, and a steady production of standardized consumer goods (Rupert, 2005).

Because workers were a mere input or resource in this system, like any other commodity; they were subject to monitoring, control, and market forces (Kochan et al.,
Workers joined unions to protect themselves from arbitrary and abusive treatment and to improve working conditions and overall quality of life. While management was granted the right and responsibility to manage, workers and unions acquired the right to bargain over the impact of management decisions on wages and working conditions. The labor-management relationship rapidly focused on advocating for separate interests in a mutual enterprise, fostering conflict and preventing the extension of dialogue beyond economic issues (Kochan & Osterman, 1994).

**Service Unionism**

Industrial unions are complex political systems that seek to balance bureaucracy and democracy (Heckscher, 1996). Unlike craft unions where solidarity and power is based in a sense of collective occupational identity, industrial unions amassed organizational power by organizing the non-craft or un-skilled workers across a company and industry. “Their only link was that they were all at the bottom of the organizational hierarchy…. Their solidarity was of a much weaker sort – that of a mass rather then of a community” (Heckscher, 1996), p. 24). Large, centralized, hierarchical and bureaucratic unions emerged to establish control over the fragmented and at times, unstable masses.

Pattern contracts established uniformed pay and working conditions, and standardized the rules of engagement between management and labor on the shop floor. These settlements and the benefits they delivered were used by leaders as a means to garner worker commitment to each other and loyalty to the union. Direct worker involvement in the negotiation process was limited because venerable workers could not be trusted to act in their own best interests (Heckscher, 1996). Yet leaders also needed to workers to act in support of union aims and interaction with management. Collective
bargaining and the bargained for benefits quickly became a ‘service’ to which union workers were entitled, and they also became the means by which union leaders could reach out to and develop relationships with union members.

In service unionism, unions ask little of workers because it is the leaders’ responsibility to deliver on the collective interests and individual needs of union members. We argue that because the current approach to union/worker engagement and education and training is based in concessionary bargaining, leaders and workers view these resources as benefits hard-won by the union which is union is responsible to deliver. Leaders ask little of workers and the education and training resources for which they have expended much political capital to secure.

U.S. Industrial Union Vocational Education and Training

The Service Model

Given the lack of union and worker voice in strategic matters like the structure of work and worker skill and training in the U.S. industry, it is not surprising that the traditional U.S. workplace education model is aimed at improving economic performance, not at helping workers achieve or expand their skills (Harris, 2000). Because the formal skill formation system in mass production is designed to maintain the most efficient methods for production, the internal training system and its pertinent skills are highly contextual, task-oriented, and instrumental. Training discourages individual discretion and judgment, and instead provides workers with the information and feedback they need to perform discrete instrumental tasks to make the production model work.

American industrial workers and their unions tacitly agreed to exchange skills, ownership
of their work, and the ability to learn and grow through their work for a higher standard of living.

However the bureaucratic, hierarchical organizational structures that support mass production have yielded to a flexible organizational model capable of innovating and delivering custom products, services, and solutions based on rapidly evolving needs (Marshall & Tucker, 1992; Savage, 1990). The old workplace contract and its training methods, both which have evolved to ensure economic stability and continuity, could not hold up under the new a economic model predicated on continuous change and instability (Beck, 1992; Castells, 1997; Kegan, 1994). The problem for workers and union is that a new social contract has yet to fully emerge in its place.

Labor’s search for a strategy to fill this void began in the 1970s when a few unions agreed to engage management in the restructuring process and in new forms of worker education and training (Appelbaum & Batt, 1994). Borrowing from the European socio-technical approach, unions sought to humanize work by redesigning jobs and shifting to team-based production. Change efforts were leader dependent and therefore dissolved soon after initiators left the company or the union.

After the 1982 recession, union-management industrial restructuring efforts surged anew. These efforts differed from previous socio-technical models because they were negotiated into the collective bargaining agreement and associated with concession bargaining. Union and worker engagement in management decision-making and increased investments in worker education and training were consider quid-pro-quo for union concessions on jobs, wages and benefits, and work rules.
The United Auto Workers (UAW) and the Ford Motor Company were the first to negotiate this new model program, which they called the Employee Development and Training Program (EDTP). The parties set aside millions of dollars in negotiated funds to support the delivery of individual skill assessments, career advisement services, and a wide variety of general education and skills upgrading programs to both laid-off and active workers (Ferman, Hoyman, Cutzer-Gershenfeld, & Savoie, 1991). They also built a large, joint union and management administrative and program delivery structure in parallel to the formal labor and management relationship to manage these resources. Since this initial model, unions and employers in a wide range of industries, among them: steel; auto; aerospace and transportation; health care; public and private service industries; telecommunications, hospitality, entertainment, and others, have negotiated programs of their own. Joint programs, as they have come to be known, are the preferred model of union-sponsored engagement, and vocational education and training today, and as such provide a wide range of general and vocational education and training to hundreds of thousands of workers across the U.S. each year (Van Buren, 2003).

Because joint programs are rooted in this era of concessionary bargaining, they are viewed by the parties including union leaders, union members and employers, as a union benefit rather then vehicles for change (Appelbaum & Batt, 1994). Rather then view these resources as strategic union assets, union leaders set out to use joint programs to improve the performance of union firms, upgrade the skills of the union membership, and expand both the quantity and quality of the educational experience for individual union members.
Union leaders used joint programs and funds to join union employers on a ‘high road path’ (*High Road Partnership Report*, 2000). The high road is where unions help companies justify the union wage premium and grow jobs in union firms. In the preface to the AFL-CIO’s High Road Partnership Report (2000), John Sweeney, President of the AFL-CIO charts this path.

We invest in workers by providing education and training and opportunities for advancement….companies compete not by paying the lowest possible wages, but by offering the highest quality and value and innovation….workers have a voice in decisions about their jobs, and communities have a voice in decisions about their economic development….there are plenty of jobs to go around—not low-wage, dead-end jobs, but meaningful work with career ladders and rewards for good work and initiative. The high road, in other words, takes us to a high-skill, high-wage economy. And that is precisely where we need to be (p. 1).

While research indicates that union high road and joint programs result in performance gains for employers and individual workers (Van Buren, 2003), no conclusive evidence to suggests that they make a material difference for unions or for the American economy. Since 2004, the U.S. has lost a net 1.7 million private-sector jobs, including 2.7 million family supporting manufacturing jobs. While the economy is growing, many new jobs are low-wage; for example, of the 1.5 million jobs added to the U.S. economy since 2003, 203,000 were in the temporary help sector. According to the U.S. Department of Labor (2005), the future holds little promise for improving job quality in America. Many occupations with the highest growth projections through to the end of 2010 are low-wage service jobs that do not require advanced degrees (*Toolbox: No recovery without middle-class jobs*, 2005).
Moreover, Union educators have long argued that improved access and quality to the educational experience that joint programs provide builds solidarity and union loyalty among workers. As Harris (2003) articulates this view:

It [union-sponsored education and training] prepares individual workers to function in a complex economic environment through attainment of varied technical and personal skills. At the same time, it should move them toward an active role in rebuilding and strengthening the [union] movement that helped to create opportunities for learning that meets their specific needs. (p. 41)

Again, experience does not support the presumed link between employment security gained through increased education and training and union loyalty. The U.S. Department of Labor (Union Members Summary, 2005) notes that in 2004, 12.5% of wage and salary workers in the U.S. were union members, down from 12.9% in 2003. These figures represent a steady decline from a high of 20.1% in 1983; the first year comparable union data are available. When union density is compared for the public and private sectors, the facts are even more unsettling. About 36% of government workers were union members in 2004, compared with 8% of workers in the private sector.

The question is not whether U.S. union leaders should continue to bargain a greater say in firms and for comprehensive education and training programs. Rather, the question is: How can U.S. unions use these negotiated gains as a strategic resource in their struggle to remain a visible and viable force in the U.S. economy?

The Organizing Model

Bill Fletcher, the former Director of Education of the AFL-CIO, believes that American union leaders and workers are conceptually unprepared to contend with globalization and the changing U.S. economic context. He observed that what is missing from the current debate in American labor is “a thoughtful, rigorous analysis of the
Learning to Organize 15

economic and political conditions we’re facing and the implications they have for the kinds of organizing unions should be doing” (Bacon, 2005), p. 6). He believes that unions need a more realistic understanding of the domestic and foreign political and economic situation.

Equally important are new approaches to workers that can help them assess the implications of these trends for their own long-term interests. “What’s missing is any sense of why hundreds of thousands, if not millions, of unorganized workers should rally to unions…. We need a very different approach if we are going to organize millions of unorganized workers” (Bacon, 2005), p. 3). He suggests—and the authors here agree—that labor needs a new conceptual framework to understand the new political economy.

Kenny and Florida (Kenny & Florida, 2004) suggest such a framework. Through research into emerging global configurations of formerly strong American-based manufacturing industries: auto, apparel, TV manufacturing, semi-conductors, and computers, they identified five cross-cutting trends that affect corporate decisions on placing work around the globe. This framework provides a far more complex story of the pressures facing firms when structuring their supply chain and market relationships. While skills, wages, and performance are vital considerations, they are not the only ones.

The five dynamics include: (1) technological and organizational advances in the fields of transportation and communications, operating in the background of each industry; (2) a multifaceted drive for greater speed and reduced cycle time; (3) unrelenting cost pressures that continually force businesses to lower costs; (4) in situ knowledge, capabilities, and clusters; and (5) proximity to the customer.
Kenny and Florida (2004) conclude that as these dynamics interact within an industry, they create different sources of competitive advantage for individual firms. Therefore, we ask: can these dynamics also create different forms of leverage and power for workers and unions? Unions must understand such dynamics and industry profiles to locate new sources of power and build new approaches to organizing workers. The prevailing labor rhetoric encourages leaders to build union density in an industry, but this may not be the most direct route to union and worker power within particular industries. A systematic, global analysis of specific industries may help unions discover new sources of power that do not necessarily rely on size.

Ironically, however, a deeper understanding of industrial contexts may also enable labor to create a more compelling vision for workers. By understanding the pressures capital creates on individual firms and communities globally, American workers may view their position more systematically and identify more with workers both at home and internationally. An expanded vision for workers may move the union agenda beyond the workplace to issues of social justice and community building (Bacon, 2005).

Johnson (Johnson, 1994) coined the expression “social unionism” to describe the qualitative differences he found between the industrial union model of organizing and the public sector union approach. While industrial unions sought to grow by organizing the unorganized, public sector unions grew through political alliance-building. Traditionally in public sector workers banded together to advocate for public policies and programs in the public’s best interests. Public workers learn to frame their claims as public needs— legitimate and administratable—and to align with or assemble coalitions around these needs, thereby turning bargaining into a political debate over public policy. Success in
social unionism lies in the union’s ability to link the workers’ interest with the larger society’s interest. In social unionism, unions emerge as hybrids of modern social movements and traditional agents of collective bargaining.

Fletcher (Bacon, 2005) advocates for this broaden approach across the labor movement at large. “We absolutely need to appeal to people to act on their immediate economic interests. But we’re also talking about a movement that inspires people with a broader vision of social justice, not simply what happens in the workplace” (p. 3). A new approach in labor will require a new leadership and new decision-making processes within unions, especially including more women and people of color if it is to succeed with a social action agenda. New forms of labor power within the economy will not emerge until new forms of power-sharing are instituted within the labor movement.

We argue that learning must be a part of the transformational strategy within unions. Leaders and members must learn new roles and strategies, and they must use new knowledge to build a more responsive and flexible labor movement and labor organizations. Labor clearly has enormous opportunities to meet this challenge by using its extensive education and training network built through concessionary bargaining. First, however, it must transform the conceptual model upon which these resources rest, from the traditional service model to the emergent social unionism or organizing model.

Fletcher (Bacon, 2005) fears that unions have turned education and training into a mere technical matter. “We don’t really work with our members to develop a framework to answer these questions (social and economic justice). So our movement becomes ineffective in fighting around these issues” (p. 3). Fletcher calls for a new labor pedagogy that expands the focus of union-sponsored learning beyond organizational
performance and individualized performative learning plans, to include a critical dialogue within labor on the complex social and economic challenges currently facing workers and unions. “What’s needed right now, desperately, are voices saying, let’s pull back for a moment and engage in the kind of discussion we need….asking ourselves, what do we mean by power” (Beacon, 2005, p. 2)?

Brookfield (Brookfield, 2000) also critiques the individualist view of education that underlies the joint program model because it works against collective and cooperative impulses. In individualized pedagogies, people can deny their common interests and human interdependence, and leave wider norms unchallenged. Uncritical learners have difficulty seeing how private learning projects are culturally formed without challenging the status quo. The alternative is to problematize the focus on self-actualization and examine definitions of what is important to learn. Decisions about personal learning plans require learners to make reflective, informed choices, where the rationales for such choices can be clearly articulated. Action must spring from a careful analysis of wider structural changes that will improve individual lives. If workers’ educational decisions are rooted in desperation of the present rather than on a progressive view of the future, then worker-centered learning or worker control over learning is an illusion. “Decision framing is as important as decision making in a…learning project…. [It is] necessary to make decisions that are carefully and critically examined and that are in our best interests” (Brookfield, 2000, p. 17).

Much of the learning supported by joint programs is additive, that is, it helps workers add to what they already know (Baumgartner, 2001). However, for Mezirow (Mezirow, 1991; Mezirow & Associates, 2000) learning is transformative, changing how
people see themselves and their world; in essence, it changes how people know (Kegan, 1994). Union pedagogy may in fact be lacking this transformative dimension of learning, in which adults become aware of uncritically assimilated beliefs and cultural assumptions and realize their entrapment within their own history. Awareness is achieved through critical reflection. Individuals who reflect on their fundamental beliefs, values, logic, emotions, and relationships will likely question their fundamental assumptions, and thus change or broaden their views of themselves and their world (Mezirow, 2000). In transformational learning, what is known may not change, but how individuals know and construct meaning expands and remains open to constant review (Kegan, 1994).

**Mobilizing existing education and training resources**

Joint programs can and should be a resource to unions in meeting this transformative challenge. However, union leaders who consider re-orienting existing education and training resources to support a broader learning agenda need to recognize that doing so is like any other mobilization; it is a political act requiring leadership. Unless union leaders can engage employers, union members, educators, and other stakeholders to re-negotiate the purpose of these assets, then the programs they support will only focus on meeting individual and corporate needs. Union leaders must help union members see these assets as more than an individual benefit to support their individual learning and career goals, and begin to view them as a collective resource to strengthen the union and improve worker’s position in the labor market. In addition, there are administrative and legal challenges because the current governance structure of collectively bargained funds place limitations on the expansion of programs beyond the narrow needs of specific employers and individual workers to whom the funds are linked.
Also, because funds are joint, employers have a significant role in deciding how to use the resources. Gaining employer support for strategic union-building goals, even in the best of labor-management relationships, is difficult.

Union leaders can begin to address these obstacles and launch a change process by using their engagement in work and learning to open the discussion beyond narrow performance needs to: the broader purpose of education and training, the nature of work and opportunity in the workplace, overall industrial and economic trends that affect and are affected by employer competitive decisions, and corporate accountability to its workforce and the community at large. Current research on work, learning, and social change (Forrester, 2002; Hamblett & Holden, 2000; Howell, Carter, & Schied, 2002; Sawchuk, 2000; Spencer, 2001) suggests that work and learning initiatives that stretch the learning context beyond the needs of production are more likely to affect workplace and social change than those that do not. Initiatives that blend occupational and job learning with reflection and opportunities for workers to engage in communities of practice, occupations, strategic business decisions and processes, industries, communities, unions, and the economy have greater potential for advancing democracy and social justice than programs limited to improving individual skill and motivation for work. Experience also suggests that these learning models deliver real gains for unions as well.

Emerging models

In 1995, Kaiser-Permanente, the largest HMO in the U.S. and the Coalition of Kaiser-Permanente Unions, AFL-CIO established an extensive partnership at every level of the company. The stated purpose of the partnership is to improve performance and provide new benefits to individual workers (*Pathways*). The parties set out to transform
their rule-driven culture into a value-driven culture, featuring mutual alignment and commitment between the organization and its people.

The union coalition quickly learned that reciprocity between the corporation and workers was not enough because the institutional union also has interests in the change process. Therefore, in addition to engaging workers on concerns to them, the company engaged with the unions on concerns to labor. This dialogue has produced tangible results for the coalition unions and for the labor movement itself. For example, the company entered a neutrality agreement with the coalition which opened the door for the unions to organize 10,000 new union members. The coalition also leveraged their partnership with the company to support broader union causes. The company twice agreed to extend health care coverage, at great cost to the company, to workers at risk of losing their medical benefits because of labor disputes with the employers who paid their health care premiums (Raine, 2004). Union leaders attribute these actions to the increased sensitivity that Kaiser Managers have developed through their participation in the partnership.

Union leaders not only need strategies to link their engagement in work and learning to change in corporate culture and behavior, but to change in their unions as well. Engagement of workers in learning and dialogue about the direction of industry, the nature of work and opportunity, and corporate responsibility will not only change the corporate character and culture, but it can and should lead to a greater voice for workers in their unions and the broader economy (Spencer, 2001).

Sawchuck’s (2001) case study of a union model of worker education in response to restructuring the telecommunications industry in Canada, explores the role of learning
Learning to Organize

in building new union capacity to engage and influence workplace and social change. The research aimed to identify whether union efforts to prepare workers to participate with management on restructuring resulted in increased worker skill and workplace democracy. The central question was how could unions use workplace learning as a tool to shape a union agenda for an industry and an alternative vision of work and workplace learning? The research team, which also included two union co-investigators, traced and evaluated the development and impact of the union strategy to respond to industry restructuring.

As the process unfolded, the union developed deeper forms of member engagement in research and policy development. Before too long, it had developed a new capacity to obtain more control over its own education. The union-sponsored education program, designed with member input, prepared union members to engage in a decision-making process with managers on work redesign and workplace change. Union programs also engaged workers in evaluating the union’s response to workplace change and in developing action plans for the union at their worksite. The results of these evaluations and planning sessions were incorporated into the union’s strategic plan for the company and the industry. The union-sponsored education not only provided union members with new skills; it also served to engage workers in their unions in new ways. A new culture of involvement, along with new systems, practices, and skills, was developed within the union that allowed for member learnings to be translated into a union strategy to deal with management and to respond to trends within the industry.

These two examples included strong leaders who were willing to engage members and employers in a learning process about the role of the union in management and about
how new forms of worker engagement, education and training would affect the union. Leadership was essential to the success of both efforts since without leadership, the unions would not have succeeded in leveraging educational resources to support broader union goals. Thus, while leadership is a key factor, it is also important not to confuse political mobilization with education.

Implications for Union Leaders and Educators

The union leader, who is concerned with the organization and the advancement of organizational aims, must be distinguished from the educator, who is concerned with the human development of the individual and the collective. All education is political because it implies a political decision, but educators cannot ensure which decisions learners will make (Bell, Gaventa, & Peters, 1990).

Horton (in Bell et al., 1990) thought that the relationship between the political activist and the adult educator is often blurred, and hence is problematic.

I think there is a danger (in politics) of imposing on people, because their emotions are involved. In education, emotions are involved, but they are a part of a whole package including intellect. In charismatic leadership (i.e. politics), sometimes only emotions are involved, and I think there is a danger of...getting converts on the basis of not really understanding what it is they're going into. (p. 109)

Leaders and organizers cannot sacrifice organizational needs for individual needs, and they can not afford for individuals to make decisions that may not align with organizational goals. “A lot of people use organizing to do some education and they think its empowerment…. But quite often they disempower people in the process by using experts to tell them what to do” (Bell et al., p 120). Even though Horton believed that people could learn from the experience of mobilization, he also thought that mobilizers could manipulate people as easily as they could educate them.
Therefore, it is not enough to garner more control over educational resources merely to use them to improve union performance. Teaching workers what union leaders think they need to know will not re-build the labor movement. Rather, what is needed is a new conception of worker-centered learning that helps workers develop critical consciousness and authentic identities as members of a community of practice sharing common interests.

Educators concerned with economic and social justice, like many union educators involved in delivering union-sponsored education and training, can follow Horton’s suggestion: find ways to work with formal and informal leaders who are positioned for strategic action and help them grow as leaders. As they grow, help them focus their learning on new ways to build the institutional and collective capacity to foster change.

Horton’s beliefs about democracy gave rise to his practice in which he insisted that participants learn democracy by doing democracy. Learners take responsibility for the content, while educators provide the vision and stimulate critical thinking, reflection, and experiential learning. Cervero and Wilson (Cervero & Wilson, 2001) argue that educators own an important role in social change. Education is tied to the larger arrangements of social institutions which historically privilege some groups over others. Education maintains or reconstructs systems of power embedded in social institutions. Power plays out in the educational process because it is linked to knowledge. At stake is: who defines knowledge, who acquires knowledge, and who determine how knowledge will be used. In effect, education is the locus of struggle among multiple interests over who will benefit from the educational process.
Educators are either working to change society for the better by seeking greater opportunity and justice, or they reinforce unjust social patterns that limit opportunity and reinforce privilege. Having a framework for how the world works, and a vision for what matters is an absolute requirement for a successful union educator program in today’s economy. However, what is needed is a dialogue within unions and within its network of union educational programs to create this new framework that can answer the vital question posed by Fletcher: What in fact is meant by power?

References


Harris, H. (2000). *Defining the future or reliving the past? Unions, employers, and the challenge of workplace learning*. Information Series No. 380: ERIC Clearinghouse on Adult, Career, and Vocational Education, Columbus, OH.


