

AN EDUCATOR'S HANDBOOK FOR LABOUR AND COMMUNITY ACTIVISTS



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ISBN: 978-1-990941-59-7



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The production of this manual was supported by:



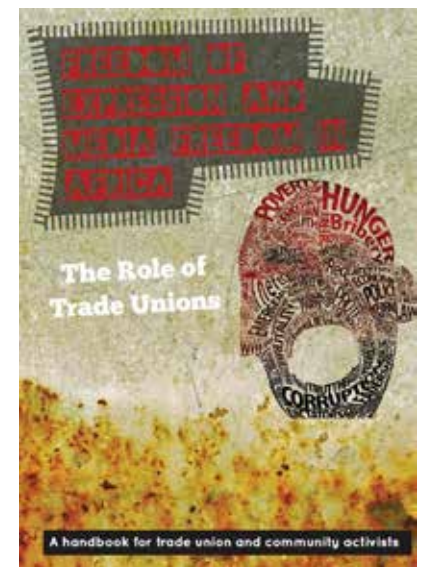
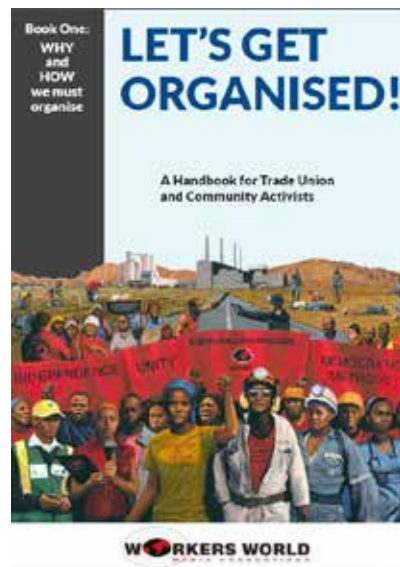
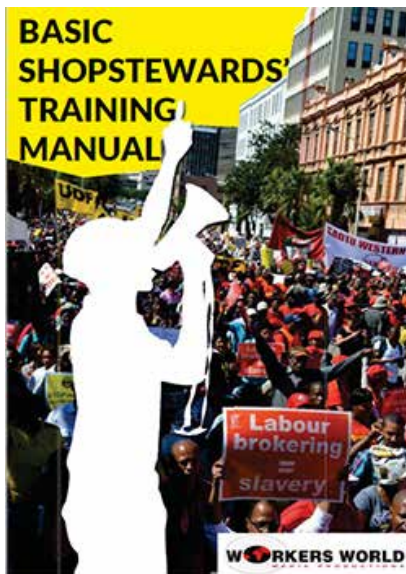
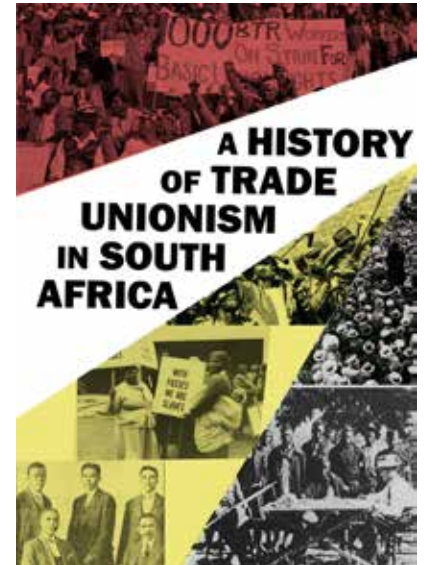
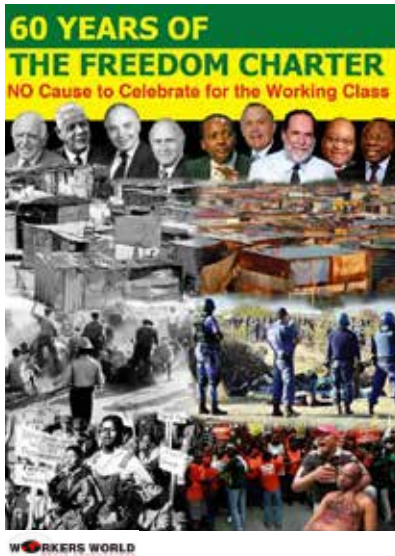
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Useful websites for worker education and organising:

Alternative Information Development Centre	aidc.org.za
Development Institute for Training, Support and Education for Labour	ditsela.org.za
International Federation of Workers Education Associations	ifwea.org
International Labour Research & Information Group	ilrigsa.org.za
Labour Research Service	lrs.org.za
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INTRODUCTION

During the last years of apartheid and under the ANC in South Africa today, after three decades of neo-liberalism – we have a working class which has been restructured – both at work (the sphere of production) and in the household and community (the sphere of reproduction). Unemployment is at over 40% whilst many of those who are employed are in forms of casualization, working for labour brokers or being outsourced. Few are in long-term permanent jobs, outside the public sector. These outcomes of neo-liberalism, together with political choices by the ruling party to serve as a junior partner of Big Business (often referred to as White Monopoly Capital or simply WMC) have precipitated a crisis in the traditional trade unions, and saw the breakaway of NUMSA from COSATU and the emergence of a new Federation, SAFTU. Similarly, poor and working class communities lack strong mass democratic organisation and political direction for a better future.

These developments are not unique to South Africa. But here we have had a long tradition of building a mass movement – including a labour movement – which defeated apartheid, and some traditions have much to teach us today.

Since the emergence of the post-Apartheid order we have also had a long wave of working class community struggles, struggles by unemployed and student youth and township women.

This has produced a strange situation – on the one hand we have a labour movement in crisis and in some disarray with members prepared to struggle and, on the other hand, we have active working class struggles – especially by new precarious layers of workers and township protests which remain in the local communities. These struggles have not linked up and levels of organisation are rudimentary and notable for rapid upsurges and then sudden collapse.

One of the lessons learnt however from the trade union struggles of the 1970s and 1980s was that democratic organisation – workers' control is key to sustaining a movement, and that education and learning of activists are core elements of building organisation and workers' control. At its height many COSATU, and before that FOSATU unions were notable for their emphasis on workers' education – conducted by worker educators themselves - as an organising vehicle. Sadly, since the 1990's we have also seen the decline in trade union democracy and their bureaucratization characterised by the dominance of top union leaders, particularly the general secretaries who operate like company CEO's, earning extraordinarily high salaries and setting them apart socially from their members.

The decline in radical worker education has accompanied these developments, with most trade unions not prioritising it any longer. Shop-stewards and members are therefore deprived of vital knowledge and skills to defend themselves, resulting in a continually weakening labour movement and consequently declining income and living standards for them and the working class more generally.

Workers learn, of course, best by direct action – strikes, occupations, Siyalalas (or sleep-in workplace occupation strikes) and blockades. But in this booklet our focus is education programmes – in which we have focused, prepared forums for learning so that we may have the knowledge to make strategic victories, strengthen our organisations and build a new society.

Today the task of building our organisations - in workplaces and communities - in all their plethora of different forms (permanent and casual, outsourced and through labour brokers, the unemployed), in communities and on farms, need to have forms of workers' education that build and revive the traditions of workers' education that flourished in the recent past and in which South Africans drew on the best of the traditions of popular education coming out of struggles in Latin America and elsewhere.

WWMP has given educational activities a high priority in the belief that education plays an important part in the strengthening and development of a strong mass democratically driven working class movement that unites community and workplace struggles. This view stems from years of practical experience which have shown the many benefits of a long-term education programme. Our main priorities are the widespread development of political or class consciousness and strong democratic working class organisations. There are many major battles and struggles that lie ahead and preparation is vital. Globally, the working class is fighting pitched battles against austerity measures and for genuine people's democracy. These struggles in Latin America (Bolivia, Brazil, Chile, Colombia), Africa (Sudan and Algeria) and the Middle East (Iraq, Lebanon, Iran and Palestine) with the yellow vest movement in France are strong indicators for us of what is likely to come and we need to prepare for.

It is our belief that key to this is the development of working class educators – those amongst us who are prepared to help stimulate our comrades and who wish to learn about the methods, traditions, theories and experiences of popular education so that they can act as the seeds of a critical mass working class movement.

We therefore prepared this handbook in order to provide those wishing to be educators with background and practical guidelines for the planning and running of programmes and courses. There are few organisations which are not engaged in some form of self-education for their members, and much of the substance of this handbook is the result of the experience of our recent past and of the workers movement internationally.

This handbook is therefore intended to assist in the revival of popular or workers' education towards the revival of the labour movement and community organisations grounded on the universal principles of UNITY, DEMOCRATIC METHODS AND INDEPENDENCE.

Acknowledgements

Chapters 6 – 15 have been adapted from the PSI Educators Handbook (1990). It also draws on materials from Ditsela and Numsa.

In Praise of Learning

by Bertolt Brecht

*Learn the simplest things. For you
whose time has already come
it is never too late!
Learn your ABC's, it is not enough,
but learn them! Do not let it discourage you,
begin! you must know everything!
You must take over the leadership!*

*Learn, man in the asylum!
Learn, man in the prison!
Learn, wife in the kitchen!
Learn, man of sixty!
Seek out the school, you who are homeless!
Sharpen your wits, you who shiver!
Hungry man, reach for the book: it is a weapon.
You must take over the leadership.*

*Don't be afraid of asking, brother!
Don't be won over,
see for yourself!
What you don't know yourself,
you don't know.
Add up the reckoning.
It's you who must pay it.
Put your finger on each item,
ask: how did this get here?
You must take over the leadership.*

1. AIMS AND CONTENTS OF THE WORKER EDUCATOR'S HANDBOOK

This handbook has been prepared with the aim of providing background knowledge for the development of worker educators and for educational activities designed for a specific purpose. It is first of all meant to be read and used by those who are starting the planning of educational programmes. It should, however, also be of use to those who already have considerable experience in trade union work, NGO workshops or popular education, but would like to consult the handbook from time to time for helpful ideas and information or consolidate their knowledge of workers' education.

It should be pointed out that the handbook does not contain complete courses or teaching units that cover specific subjects. It will, however, be followed by additional one-issue workbooks and modules that go into more detail on different topics. It is intended that the different materials will gradually develop into a comprehensive resource for worker educators.

Self-reliance in self-education

The handbook is designed in a way that will assist workers' organisations in achieving the long-term objective of self-reliance in education – that is to plan and conduct our own education programmes.

Different words – one meaning

One of the problems of writing a handbook like this, meant for use in many different forms of workers' organisation, is that the same thing is called by different names in different places. For example, the person that runs the educational activity may be called a facilitator, a local education committee member, a teacher, a monitor, or – as we do here – an educator. The same applies to the terms of goal, objectives and aims which in this handbook are used without distinction.

Although we have tried to avoid using ambiguous or disputed terms or jargon, expressions which are part of everyday language in the field of education have not been paraphrased or ignored, but rather explained in order to familiarise people with them.

The sections of the handbook

The handbook consists of three main sections. The first part gives an overview of the roles of adult education, popular education, and workers' education, their objectives and theories. The second part deals with planning and implementing; and the third part with administering educational activities.

We intend to amend and develop the handbook according to the needs and expectations of its users and would, therefore, greatly appreciate any comments or criticisms – both positive and negative – emerging from the practical use of it.

AIMS OF THE HANDBOOK

This manual aims to help you, the Educator:

- Think about popular education for liberation; the philosophy and approach.
- Learn to use active learning methods based on an experiential and participatory learner centred approach.
- Develop your skills and effectiveness as an educator and facilitator of learning.
- Familiarise yourself with and learn to use active learning methods that encourage involvement and action.
- Prepare your own educational materials, including understanding learner profiles, setting aims and designing learning activities.
- Learn how to build learning communities, evaluate courses and encourage a link between education and action.
- Develop an approach that will see you using education to build organisation.
- See how learning can be fun!

2. ADULT EDUCATION, POPULAR EDUCATION AND WORKERS' EDUCATION

In all societies we learn everyday of our lives. Some of what we know we have learnt through experience, some through what we are told by our parents, families and friends, some through information and opinions we get from the media, from religious authorities and from books.

As children most of us went to school for at least some of our lives, where we learnt many things, but also forgot so much that many of us do not have pleasant memories of school.

But as adults we now already know that not everything we have learnt is true and that so much of what we have been told is a view that serves the interest of the powerful, the wealthy, those who control our world.

We know that education is not neutral.

We know that under Apartheid we were told that black people were inferior, not properly human, while white people were regarded as superior and always the experts on everything. We know that we get told that women are naturally mothers and housewives and only men are strong and can provide leadership. We know that newspapers, TV and radio tell us every day that the CEOs of businesses earn a fortune because they are smart while workers earn little because they need supervision, are lazy and know nothing.

So what is "knowledge" that is not neutral?

Karl Marx, the revolutionary thinker and activist, once wrote that "In every epoch the ruling ideas are the ideas of the ruling class". He was saying that so much of what we have learnt are consistent with the ideology of the ruling class. Yet he also argued that the working class will be its own liberator and did not need some charitable intellectual or philanthropist to come along and do the job for us.

Years later, one of his followers and fellow activists, the Italian Antonio Gramsci said that the ruling class – which is actually a very small group of people – run society because they are able to convince us

that their superiority is natural and simply makes "common sense". He called this notion "hegemony".

What both of these great thinkers and activists were grappling with is precisely this problem – that education and knowledge is not neutral: On the one hand they are weapons that the rulers and the powerful use to keep us in our place, divide us and persuade us that being oppressed is natural. But on the other hand education and knowledge can be weapons for us in fighting against that oppression and the power of those who rule society.

This tension is at the heart of ideas like Adult Education, Popular Education and Workers' Education. We shall explore these concepts in this chapter.

But first let us note that we call what is undergone at schools, colleges and universities is FORMAL EDUCATION and what happens in Adult Education, Popular Education and Workers' Education is NON-FORMAL EDUCATION. But of course we need to be careful of these definitions because they can make us believe that the latter is of less value or that it takes place without some kind of formal structure – which is, of course, not necessarily true. So we must be wary of this separation.

But let us start with understanding what Adult Education is.

2.1 What is Adult Education?

It appears obvious – the education of adults, one would think. But for what purpose, and by which methods? This is a contested terrain.

For many years this was seen – particularly in poor countries - as being mostly about literacy. Teaching adults to read and write. States interested in development took this up as mass literacy programmes and used the methods of formal education to train adults to read the symbols of written language. Otherwise it was a cause taken up by well-meaning churches and charitable agencies. In

time it even became known as Adult Basic Education.

In South Africa in the 1990s – as it appeared that the Apartheid state was ready to negotiate a transition to democracy – COSATU started placing an emphasis on the economy and a future industrial strategy and making South Africa globally competitive. As a result COSATU unions identified Adult Education – not as a method for critical thinking – but as an approach that the bosses could use to make workers more productive. In this COSATU turned its back on its own history of Workers Education and started calling for Adult Basic Education and Training (ABET), that workers should be trained to help make the bosses richer and that education should be about getting certificates and credits as part of a career path for individual workers.

This is a discussion that we should all re-look at and understand how this perspective impacted on the trade union movement.

Over the same period many employers started feeling frustrated that workers were inclined to go on wild-cat strikes and acts of disobedience. Or they found that workers often defied Collective Agreements made with bosses, particularly when they found that many agreements had clauses which were against the interests of workers. These bosses blamed shop stewards and unions for not doing their jobs of policing workers and teaching them labour law. This tendency became more pronounced after the ANC government promulgated the new Labour Relations Act in 1995 – which gave workers certain rights but expected trade unions to be responsible for keeping workers in check.

So many bosses started calling for “trade union education”, for which they were even prepared to pay and hire consultants – by which they meant taking the radical politics out and doing training in Labour Law and the brand of economics that showed that workers should support their bosses to become more competitive.

Again it will be important that workers discuss what was gained and what was lost for the working class in these processes.

But in this educators’ handbook we will look at Adult Education as part of the tradition of building a critical consciousness for our movement of the working class. And we will understand Trade Union

Education as political – as part of the radical tradition of Workers’ Education – which is part of building a working class movement for social change.

What are some of the main ideas in adult education and the development of active learning?

We will consider such questions as:

- How is adult education different?
- What are the main characteristics of the adult learner?
- What positive and negative aspects do adult learners bring with them?
- What are the implications of this for the adult educator?
- What are some of the key ideas or principles involved in the teaching and learning of adults?
- How do these key principles relate to the values and beliefs of democratic organisations?
- And what informs our education approach

How is adult education different?

One of the first questions to be asked about adult education is whether it is different from education in schools. To explore this question we need to look at the main characteristics of the adult learner you will be working with as a popular educator. Some of the main characteristics of adult learners are:

An adult with experience of life. All adults have an experience of life and in this way are different from school students. This experience of life will often be their starting point in looking at new information and ideas.

A need to be acknowledged and respected. Nearly all adults have a need to be respected as an individual. The same may apply to school students, but this need for respect will be more developed in mature adults.

Someone who is keen to learn. You will find that most adult participants are active and keen to learn. They will see an educational course or workshop as an opportunity to learn along with other adults. Working people may have limited opportunities to attend educational workshops and activities and will usually value the experience.

A person with expectations. Participants will arrive at an educational course or workshop with expectations about what they will learn and what benefit they are going to get out of it. Dealing successfully with these expectations is an important part of the adult educators' task.

Different experiences of formal education. Adults may have different levels of experience of formal education. Some participants may have had little formal education, while others may have had negative experiences and as a result may lack self-confidence.

A wide variety of age ranges. Most adult education courses and workshops will be made up of participants from a wide variety of age groups, unless they are specifically aimed at a particular age group. Older participants may be nervous about exposing themselves to the ideas of younger participants. Younger participants may feel patronised by some of the "old timers."

Commitments. Adults will have a large number of commitments and responsibilities. These commitments may include work, family and social commitments. In this way they will be different from school students and some students in formal education. Women participants are likely to have a higher level of domestic and other family commitments.

Key ideas in adult education

Having looked at some of the main characteristics of adult learners, we can consider some of the key ideas for effective adult learning. These are sometimes referred to as principles of adult education.

Needs Assessment. When a group of adults comes together to learn they may have different experiences and expectations as learners. Listening to these needs, discussing them and helping to meet them is a key principle of adult education. Needs assessments need to be carried out before a course/ workshop starts and also during the course / workshop.

Safety. Safety in adult education refers to creating a climate where participants' views are listened to and new ideas and information can be considered and evaluated. A safe environment for adult education includes trust between the facilitator and participants

and trust in the curriculum or course material.

Sequencing and Reinforcement. Adult education workshops need to be designed in such a way that new topics and concepts are dealt with in an order that goes from simple to complex, or are organised around a particular concept. Wherever possible, the starting point should be the experience of the learner. This sequencing will assist the learner. In addition, key ideas will need to be reinforced in order to encourage learning.

Praxis. Praxis is a Greek word meaning reflection with action. The central idea is that adults do something, reflect on this action and then learn from this reflection and apply or change as a result of this new learning. In adult education this is sometimes referred to as the 'do, review, learn and apply learning' cycle. The importance of reflecting and action (praxis) is one of the central ideas of the popular education movement inspired by the work of the Brazilian educator Paulo Freire. Praxis is closely linked to the idea of learning by doing, the technical term for which is experiential learning.

Respect for the learner. Respect for learners as subjects of their own learning is based on the idea that adults are decision makers in most parts of their lives. They will wish to make decisions about when, what and how they learn. In this way they are the subject of the learning process and not the object of it. While an adult educator may assist with these decisions, individuals take responsibility for their own learning.

Ideas, feelings, actions. Adult learners learn through the mind, emotions and body. The technical term for these three aspects, or domains, as they are sometimes called are cognitive, (ideas and facts) affective (feelings and emotions) and psycho-motor (actions). Current thinking is that all three of these aspects are important in the learning process. Addressing all three areas are important principles of course design.

Relevance and immediacy. Most adult learners need to see the immediate usefulness of the new skills and knowledge they are acquiring. They want to spend time studying what they can apply now, or in the very near future. Connected to this is the idea of a problem centred approach to adult education. Adults respond to working through relevant problems and

searching for solutions to these problems. In this way the education is relevant to their needs.

Collaborative learning. Adult participants learn from each other and this is sometimes referred to as peer learning. Presenting situations where adults can learn from each other's experiences, as well as their own, is an important part of the adult educator's role. This can be done through general discussion but is also encouraged by the use of group work and team exercises.

The role of the facilitator. A key feature of most adult education is the changing role of the teacher or facilitator. The tutor's role is to facilitate the learning of the adult education group. This means a different kind of authority to the traditional teacher in the formal education system. The relationship is more equal and there is a greater level of negotiation or dialogue involved between the facilitator and the participants. The facilitator is respected for the way learning is organised as well for their expertise in a particular subject or issue.

Critical thinking. Adult education is concerned with looking critically at the world and seeking alternatives to current ideas and circumstances. Critically examining ideas, emotions and actions is an important part of adult learning.

Critical analysis of the adult educators' role. As adult educators become more experienced they also need to think critically about their own roles and actions. This kind of professional critical analysis is best carried out in two ways: firstly by listening to participants and their evaluations, and secondly by engaging in dialogue with other adult educators facilitating similar education activities.

Things to consider in facilitation practice

As a popular educator you must consider:

A democratic approach. Your first task will be to set the tone for any course or workshop. One of the best ways you can do this is by demonstrating that you have a democratic style yourself and you genuinely wish to involve all members of the course equally. You will find that you will be helped in the early stages when you explain the democratic nature of active learning and carry out some of the activities

aimed at explaining this approach. After this it will be your willingness to involve the whole group that will matter.

Your authority. A facilitator derives some of his/her authority from his/her position. In your case you are likely to be from a similar group and background as your participants. You will find that you will be respected as part of the group and for the efforts you make in organising the course. You will not have to tell people what to do, but will obtain co-operation as a comrade who is also learning.

Your responsibility. As a educator, your main responsibility is to the movement. You have a responsibility to ensure that the education courses you run are effective and in line with movement ethos, principles and policy. You also have a responsibility to participants to provide a climate where they can learn and plan to turn this learning into action. Most organisations have limited resources for education and most participants will have limited opportunities to attend course or study circles. This makes it essential to provide effective education activities.

Sensitivity. You will need to be sensitive to the needs of different participants. There will be differing levels of experience, skills and abilities amongst any group of participants and it will be your task to be aware of these differences. You can then set about improving the skills and confidence of some participants and ensure more experienced participants share their experience, without dominating.

Making education fun. Most of your participants will be working people or busy officials. Education opportunities will be rare events and should be enjoyable. Making education sessions lively and fun will help to make them enjoyable and memorable events. You will need to develop the skills to do this whilst keeping a sense of purpose and giving participants the confidence to change things.

Flexibility. You will need to be flexible. In most courses you will have some clear aims and a number of set tasks to perform. It usually will be your responsibility to see the programme is carried out. At the same time you will be asking the participants for their ideas about what the course should include and how it should be adapted. You will have to balance their needs against the key tasks that need to be

completed. This will require a flexibility of approach and a willingness to discuss any dilemmas that may arise.

Policy. Be aware of your organisation's policy and feed this into the course. In some cases you may find that policy, which is based on the wider good, may be unpopular with any particular group. It will be your task to explain the policy and not just go along with the group. This is particularly important with prejudice and discrimination against women and other oppressed groups. Being democratic does not always mean going along with people's views.

Opportunities to build organisation. As an educator or study circle leader you will find that there are many opportunities to help build and strengthen your organisation.

Race, class and gender dynamics. As an educator you will find that there may be different needs and expectations from participants based on their race, class or gender. Be alert to this! And ensure that the particular issues of women are built into your programme.

General tips for facilitators

- Keep the atmosphere relaxed and enjoyable.
- Be punctual yourself and encourage the participants to do the same.
- If you are running a session be well prepared and have an overall plan of what you want to cover.
- Get to know your participants by name, as quickly as possible. Use nameplates to help you or make a brief sketch of people's names and where they are sitting.
- When facilitating discussion, challenge participants in a way that makes them think. In particular challenge generalizations and stereotypes.
- Let discussion flow freely, but steer the discussion to achieving the aims of the session.
- Look for opportunities to reinforce basic worker policies and values.
- Ask for practical examples and personal experiences.
- Be honest about your experience. It is fine to say that as a trainer you are not an expert or economist or lawyer, and that you do not know the answer to a particular question.
- Don't be afraid to use your own personal experience, if it is relevant and useful.
- Allow time for new ideas to sink in and check whether they are genuinely understood.
- Promote active participation between participants and get them to exchange experiences and ideas.
- Always summarise any session and stress the key points. Encourage the development of strategy or action when summarizing a topic or issue. Make links with other parts of the workshop.
- Get used to using a notebook to write down any observations as to how any session went and how you might change things next time.

As an educator your presentation skills are critical, as you will be leading participants into action! The following are some basic presentation tips:

- Speak slowly and clearly.
- Keep your speaking style interesting. Use a variety of tones, speed and volume in your voice.
- Consider your attitude and tone. Generally participants are most receptive to a non-confrontational, non-aggressive, and positive approach. Participants value openness and honesty.
- Make eye contact with the entire group. Keep scanning the group in order to notice confusion, boredom, etc.
- Do not use words, phrases, or abbreviations that participants may not understand. Avoid the use of rhetoric, unexplained abbreviations, robust ideological statements, or jargon.
- Have a dialogue with the group. Always try to ask open-ended questions to stimulate involvement.
- Do not take hostile remarks personally.
- Keep the focus in mind and keep control of the group. It is sometimes important to set direction or limit discussion. Do not let one person or a few people dominate the discussion. Actively intervene, if necessary, to ensure everyone participates.

- Do not make assumptions about the background (class, race, ethnicity, religion, educational level, etc) of your participants. Making assumptions can make people feel invisible or alienated.
- Let the participants like you. Assume that the participants are friendly and do not be afraid to smile.
- If you are not sure whether the group understands a major point, feel free to check with the group. Similarly, if the process is not going well, ask for the group's advice. It is not a sign of weakness or incompetence to do this; rather, it is an empowering style of leadership.

2.2 How Adults Learn

- Adults are voluntary learners. They perform best when they have decided to attend an education session for a particular reason. They have a right to know why a session is relevant or important to them and to change it if necessary.
- Adults have usually come with an intention to learn. If this motivation is not supported, they will switch off or stop attending.
- Adults have experience and can help each other learn through an atmosphere of sharing.
- Adults learn best when they are actively involved.
- Adults learn best when the context of the training is relevant to their own lives and experiences.
- Adults are capable of taking responsibility for their own learning
- Experiences are often the basis for learning new things.
- Adults learn quickly when they experience the need to know or want to perform a task more effectively.
- As adults grow older their power to observe things and to use reason grows stronger.
- Adults learn best by doing practical activities.
- Best learning takes place when all senses are involved.

2.3 Can education be neutral?

Ideas that are taken as natural, as part of human nature, as universal concepts are given a veneer of neutrality when, in fact, they are part of the superstructure of a class-ridden society. Ideas are presented as if they are universal, neutral, common sense – like choice, competition, decent work, Fourth Industrial Revolution, Radical Economic Transformation etc. when in fact they are ideological constructs, ideas serving as weapons for social interests, instruments of class oppression if you like.

Contrary to what we are led to believe, these ideas are not neutral. They are determined by the existing relations of production, by the economic structure. And they change according to the interests of the dominant class in society. They do not serve the common good but are accepted by everyone *as if they were for the common good*. We are constrained to accept the outlook and the morality of a numerically insignificant fraction of the population.

A pedagogy of the oppressed: understanding how education is shaped in society

If we agree that education is a basic condition of human existence and that without it, we will face profound difficulties in family life, social life, in expressing ourselves, in our interactions within communities, at work and in society more broadly; we need to understand how education is shaped in society.

From a Marxist perspective life is not determined by consciousness, but consciousness by life. In Marx's theory of knowledge, in which he explained the notion of base and superstructure, he argues that the institutions we build, the philosophies we adhere to, the prevailing ideas of the time, the culture of society, are all determined to some extent or another by the economic structure of society. This does not mean that they are *totally* determined but they are quite clearly a spin-off from the economic base of society. The political system, the legal system, the family, the media, the education system are all rooted to the class nature of society, which in turn is a reflection of the economic base.

This is what Marx called the superstructure. He maintained that the economic base or infrastructure had built upon it a superstructure that kept it functioning. The education system, as part of this superstructure, is therefore a reflection of the economic base and serves to reproduce it. The institutions of society, like education, are reflections of the world created by human activity and that ideas arose from and reflected the material conditions and circumstances in which they were generated.

This boils down to the fact that “the class which is the dominant *material* force in society is at the same time its dominant *intellectual* force”. In other words, under capitalism, the ruling class determines the agenda. They rule as thinkers, as producers of ideas that get noticed. They control what goes by the name of what’s considered “common sense”. What Gramsci coined “ideological hegemony”, when he described the influence the ruling class has over what counts as knowledge.

Simply put, education, knowledge, etc. is embedded in class relations. Therefore under capitalism education reflects, reinforces and replicates the tendency of capital to produce and reproduce inequality.

We can and must therefore contest the hegemony of the neo-liberal educational common-sense. We must contest the notion of valuing knowledge merely for its potential economic outcomes. We must contest the language of global competitiveness, productivity, etc. We must contest the very notion that we can remove politics from any discussion on education!

And while contesting, we must assert the kind of future we envisage and the establishment of building blocks to get there! Beyond the rhetoric.

But we cannot talk about education, outside of one critical question. What kind of society are we trying to build? What’s our vision for an alternative?

For those of us in the progressive, revolutionary movement this is clear. Our task is about building real alternatives for workers and the poor! Our task is about advancing towards Socialism.

This is where our education and our pedagogy is most critical! This is where our task as educators is even more critical! We must contribute to creating the conditions that will shift workers’ (and ultimately society at large) consciousness towards our vision

for Socialism. And in so doing we must be creative, imaginative, challenging, and even dangerous!

So now we have learnt what Adult Education is as an educational methodology. What then is Popular Education?

3. POPULAR EDUCATION:

A pedagogy of the oppressed

The method of Popular Education came out of political struggles for social justice and socialism in Latin America – a continent where US Imperialism not only kept dictators in power but disrupted any attempts by popular movements to build a better society.

Much of the theory and methodology of Popular Education was codified by a Marxist priest called Paulo Freire (1921-1997), a Brazilian educator and political philosopher.

Freire believed there should be dialogue between pupil and teacher, that understanding the world was as important as understanding the word, that understanding should build social capital. He was especially concerned that the oppressed become the oppressors when given the opportunity and how to break the cycle. His *Pedagogy of the Oppressed* is currently one of the most quoted educational texts (especially in Latin America, Africa and Asia). He was a founder member and leading guru of the Brazilian Workers Party (PT).

Through this radical pedagogy, he hoped, adults would learn to perceive social, political and economic contradictions and would take action against the oppressive elements of reality (a process that Freire called “conscientisation”).

Freire condemned traditional education systems, which he called “banking systems”, where students are passive recipients of deposits from an “all-knowing” teacher. In contrast he proposed an education based on dialogue, generating a permanent process of reflection and action:

If learning to read and write is to constitute an act of knowing, the learners must assume from the beginning the role of creative subjects. It is not a matter of memorising and repeating given syllables, words and phrases, but rather, of reflecting critically on the process of reading and writing itself and the profound significance of language.

Paulo Freire grew up in the Northeast of Brazil where his experiences deeply influenced his life work. The world economic crisis forced Freire to know hunger and poverty at a young age. Because Freire lived among poor rural families and laborers, he gained a deep understanding of their lives and of the effects of socio-economics on education.

Freire became a grammar teacher while still in high school. Even then, his intuition pushed him toward a dialogic education in which he strived to understand students’ expectations. While on the Faculty of Law in Recife, Freire met his wife, Elza Maia Costa de Oliveira, an elementary school teacher and an important force in his life. They married in 1944 when Freire was 23 and eventually had five children, three of whom became educators. Gadotti asserts that it was Elza who influenced Freire to intensely pursue his studies, and helped him to elaborate his groundbreaking educational methods.

In the 1950s Freire lived and worked in the slum areas of Recife and increasingly focused his efforts on tackling the problem of adult literacy: “It seemed to me profoundly unjust that men and women were not able to read and write”. Equally he recognised illiteracy as “just one of the concrete expressions of an unjust social reality”. As a result he developed a new approach to literacy which linked “learning to read the word with learning to read the world”.

Freire’s arsenal of educational thought began to manifest with his appointment in 1946 as director of Education at SESI, an employer’s institution set up to help workers and their families. Here he began to see more disconnections between elitist educational practices and the real lives of the working class. Gadotti says, “Thus, a study of the language of the people was the starting point for the development of his work ...”. During this time Freire also participated in the Movement for Popular Culture, and supported the active exercise of democracy in lectures and in his PhD thesis, “Present-day Education in Brazil,” written in 1959. His convictions would earn him the title of “traitor.”

Freire's pedagogy of literacy education involves not only reading the word, but also reading the world. This involves the development of critical consciousness (a process known in Portuguese as *conscientização*). The formation of critical consciousness allows people to question the nature of their historical and social situation - to read their world - with the goal of acting as subjects in the creation of a democratic society (which was new for Brazil at that time). For education, Freire implies a dialogic exchange between teachers and students, where both learn, both question, both reflect and both participate in meaning-making.

This pedagogy begins with the teacher mingling among the community, asking questions of the people and gathering a list of words used in their daily lives. The teacher was to begin to understand the social reality of the people, and develop a list of generative words and themes which could lead to discussion in classes, or "cultural circles". By making words (literacy) relevant to the lives of people, the process of conscientisation could begin, in which the social construction of reality might be critically examined.

1962 saw the first experiments in Freire's method when 300 farmworkers were taught to read and write in just 45 days. As a result, the government approved thousands of cultural circles to be set up all over Brazil. Unfortunately, the military coup of 1964 halted the work, and changed Freire's life.

The Brazilian Literacy programme was terminated. Freire was imprisoned, accused of subversion, and subsequently exiled to Bolivia and then Chile. He took these developments as confirmation of his theory that "no education is neutral" commenting: "I was jailed precisely because of the political nature of education".

In June 1964, Freire was imprisoned in Brazil for 70 days as a traitor. After a brief stay in Bolivia, he lived in Chile for five years working in the Christian Democratic Agrarian Reform Movement. In 1967 he published his first book, *Education as the Practice of Freedom*, bringing him acclaim and a position as visiting professor at Harvard in 1969. In 1968 he wrote his best known book *Pedagogy of the Oppressed*, published in Spanish and English in 1970, but not published in Brazil until 1974.

Freire was invited to Geneva in 1970 where he worked for ten years as a special educational adviser to the World Congress of Churches. During this time, Freire travelled worldwide helping countries to implement popular education and literacy reforms. Some of his most influential work was in Guinea-Bissau (a West African country) where he advised national literacy efforts and consequently published *Pedagogy in Process: The Letters to Guinea-Bissau*.

In 1979, after 15 years of exile, Freire was allowed to return to Brazil and did so in 1980. He joined the Workers' Party (PT) in São Paulo and, from 1980 to 1986, supervised its adult literacy project. With the triumph of the PT in 1988, Freire was appointed Minister of Education for the City of São Paulo.

In 1991 the Paulo Freire Institute was created, "congregating scholars and critics of his pedagogy, in a permanent dialogue that would foster the advancement of new educational theories and concrete interventions in reality [This work] is carried out by 21 scholarly nuclei located in 18 countries". The Institute is centered in São Paulo and maintains the Freire archives.

In 2 May 1997, aged 75, Paulo Freire died of heart failure.

Paulo Freire's ideas led to the foundation of a popular education movement in Brazil and in Latin America. Community educators and religious groups working with the poor use his techniques and methods and they can also be found today in worker education courses and training courses. According to Freire, the role of the teacher or educator is to:

- Break down the barrier between teacher and learner
- Speak the "same language " as the learner
- Be aware of how they construct their universe of meaning
- Be aware of learning needs
- Start from where the learners are
- Encourage them to learn and explore their own experiences.

4. THE STATE OF WORKER EDUCATION:

An experience from America

For most of our existence, we shared the Earth in common. That is, there was no private property, nor, in fact, much consciousness of ourselves as individual beings, separate from one another and separate from the natural world of which we were a part. It is only during the last few hundred years that most of the commons has disappeared, converted into private property, embedded in a new mode of production—capitalism.

The destruction of the commons was achieved largely by violence; as Marx put it, “capital comes dripping from head to foot, from every pore, with blood and dirt.” However, more was needed to eradicate the commons. A relentless propaganda war has been waged to convince us that capitalism is good, that it embodies the deepest desires of human beings, that it is the culmination of our attempts to master nature and produce abundance. That, in fact, possessing the earth in common is a bad thing, destructive of human productiveness.

And yet, despite all of this, we still yearn for open, free spaces, for community, for belonging. But how do we bring these back? Radical education might help. In discussing “commoning”—the act of doing things together, such as working in a community garden or caring for a forest that is used by an indigenous group of peasants in India—historian Peter Linebaugh says, “Communal values must be taught, and renewed, continuously.”

Parents, churches, civic organizations, and the like might try to inculcate such values in the children and members, and when people engage in collective struggles, they learn them. However, it takes more than this to make collective ways of thinking an integral part of our lives, providing, in effect, a compass that gives us direction. Radical, critical, and continued education is needed. It will not only help to put our lives and actions into context, but it also will give us a better understanding of what needs to be done in the future. Through it, we can learn to analyze our individual histories, to, in effect, come to better understand the complexities of our lives.

There are many elements in radical education. First, there must be a relationship of mutual respect between teacher and student and a sense that both are part of a larger project, the liberation of humanity from the shackles of capitalism. While the teachers have specialized knowledge, they learn from their students in a give-and-take process of democratic discussion. If education isn't egalitarian, how can we expect anything else to be?

Second, those who teach must, whatever the topic, direct the conversation toward the nature of the system. A science teacher can ask, what influences the questions science poses? How is science funded? Is what a scientist does value-free? Then, pose a question such as, why is so little government funding given to researchers who want to know the possible consequences of genetically modified organisms? In social sciences, one could ask how likely it would be for a scholar to earn a PhD if the thesis subject is “How can a guerilla army best defeat the U.S. armed forces in Iraq?”

In worker (and peasant) education, the question “What is capitalism?” is paramount. The teacher must try to show that this is a system that rests on a bedrock of exploitation, oppression and expropriation. Even if a class is about a practical matter, such as labor law or organizing a union, the nature of society is critical to explaining what the law is, why unions are necessary, and so forth. In all organizations, whether they are fighting for a cleaner environment, better housing, lower rents, converting abandoned urban land to community gardens, ending theft of peasant lands, socialized healthcare, free quality education for all, ending racism and patriarchy, or the termination of wars and imperialism, capitalism must be central to the teaching and learning. It might seem that teaching the nature of capitalism is a daunting task, but peasants have been taught the rudiments of the three volumes of Karl Marx's magnum opus, *Capital*. I have taught the same to people with limited formal education. Nothing is impossible. In fact, I imagine that peasants and the poorest paid and most exploited workers will grasp these rudiments quickly.

Third, every entity seeking radical change must have an education component integral to its operation. Labor unions and peasant organizations need to set aside time and resources for this. Political parties and formations, Occupy Wall Street-types of movements, antiwar organizations, anti-racist and anti-patriarchy movements need education efforts as well, ones that become permanently built into their structures. Planning actions, carrying them out, assessing successes and failures—all are vital subjects of education for members and participants.

Fourth, radical education is about making connections. One organization's projects are connected to those of every other group; each person's life is part of a larger whole. For example, some employers, especially in restaurants, have a work requirement known as "clopening," in which the same workers who close late at night must get to work early the next morning to open the place for business. Suppose a movement developed to end this practice. The damage done to workers by clopening—lack of sleep and the attendant mental and physical stresses—could be directly tied to the need for shorter hours and more free time, such as vacations and personal days. This, in turn, could lead to the question of what gives an employer the power to make clopening mandatory and, more generally, to decide how we labor and with what intensity. Or imagine that an urban coalition of fair housing groups is trying to force a city to stop giving tax subsidies to the builders of luxury apartments. This specific struggle could be connected to the need for high-quality public housing, as well as to the societal benefits of stopping the gentrification of working-class neighborhoods.

Racism, patriarchy, imperialism, and the despoliation of the natural world are all connected to exploitation and expropriation, as is climate change. Radical education, by showing why this is so, can help to ignite the class consciousness necessary to change the world.

Fifth, whatever the setting, begin with the lives, the daily experiences, of the students. Education scholar and teacher Ira Shor begins a writing class with community college students by examining the chairs on which they are sitting. He first has them carefully describe the chairs, forcing them to look at these objects carefully and slowly. However, the description is just the beginning; through discussion

and more writing, Shor and his students discover the chair's origin within the economy and the cultural assumptions behind its production (e.g., why it's so uncomfortable!). Ultimately, the students, mostly through their own efforts, are able to divest the chair of its commodity fetishism by understanding it in relation to the society that produced it. The complete exercise not only demystifies the chair but gives a striking experimental demonstration of how to analyze capitalism and of the dialectical method of understanding one's own environment.

Labor educator and Monthly Review co-founder Leo Huberman gives a striking example of radical and critical teaching. He asks his worker-students a series of simple questions about their lives as working men and women. Where do you work? Why do you work? Does the man who owns the factory work alongside you? Have you ever seen the stockholders of the corporation working in the plant? But you all agreed you had to work in order to live; now you tell me there are some people who live without working. How come? Then there are two groups of people in our society. One group, to which you belong, lives by . . . ? And the other group to which your employer belongs lives by . . . ?

The questions continue until the teacher and the students see that profits are unearned and come at the expense of the sweat and tears of those who perform their labor. It's a brilliant exercise, eliciting from the students the most basic element of their work lives and generating a lively discussion of what they might do about it.

Sixth, radical educators should teach in such a way that some of the students will themselves take what they have learned and teach it to others. The goal is to create organic intellectuals, that is, people from the working class who become capable of spreading the word the way Leo Huberman did. Some of the prisoners I once taught took my lecture diagrams, which I had copied and distributed, back to their cell blocks where they used them to teach fellow inmates. Similarly, union members can teach their brothers and sisters. Not only does this greatly increase the number of teachers, but it also breaks down the hierarchy between instructors and pupils. There is no reason too that parents cannot begin to discuss what they have learned with their children. In fact, radical education should commence as soon as possible.

Radical education can be done in many places. However, the capitalist system dominates our lives and severely limits what is possible. Teachers in both public and private elementary and high schools will face severe repercussions should they engage in radical conversation with their students. Colleges provide freer spaces, but they are becoming more repressive. Adjuncts, who now teach most of the classes, subject themselves to discharge should they displease administrators or hostile students.

I was a labor educator for 34 years, mostly through worker education programs attached to universities. I began in 1980, but by the time I retired, in 2014, the number of such programs had diminished markedly, victims of hostility from businesses and their collegiate allies. Sadly, some that survived moved online, and classes were opened to all students and not just workers. Strict rules were established by program administrators for instructors, absurd in their detail and curtailment of academic freedom. Others simply transformed themselves into regular academic departments, in which students could pursue BA and advanced degrees no different than those of any other department. Faculty were expected to do academic research and perform all the other duties expected of those wishing to rise in the institutional hierarchy.

For example, my first job as a labor educator was through Pennsylvania State University. The Labor Studies Department had an outreach wing in which instructors taught workers once a week for three hours in working-class towns and cities in the state. I taught in Johnstown, Greensburg, Beaver, and Pittsburgh. These were rewarding classes, with great students eager to learn and, armed with new knowledge, ready to become thorns in their employers' sides. Within a decade, these classes were eliminated, and the department became just another wasteland of academic hustling.

Within the unions, education, where it exists at all, is almost always limited to narrow, nuts-and-bolts subjects like running meetings, processing grievances, preparing for arbitrations, and the like. There is little about the union's history and the need for new members to become actively involved in every aspect of the union's activities, not to mention the active encouragement of such involvement. It would be rare, indeed, for a union to educate its members about the working of the nation's and the world's

political economy, as well as overall labor history. I have never heard of anyone, outside of perhaps a few in unions such as the United Electrical Workers and in some locals of what were once left-led unions like the International Longshore Workers Union, do what Leo Huberman did when he directed union education efforts. **I would say that most union leaders fear an educated membership, one that might defy them and seek to make their unions radically democratic.** I might add as well that when I was being considered as a teacher in the University of Massachusetts's Union Leadership and Activism program, I was red baited by some higher-ups in the AFL-CIO. I was hired anyway, but you can see the problem. The AFL-CIO is a conservative organization, with a long history of anticommunism. If it runs a worker education school or has influence over one, the likelihood of critical, radical education diminishes.

All of this is not to say that radical education cannot take place in Labor Studies Departments and labor unions. It can and sometimes does. But continuous struggles are always necessary to introduce and maintain it.

There were once, in the United States (and in other countries as well), independent worker education schools. Sometimes these were initiated and run by political parties and sometimes not. Perhaps now is the time to recreate them. I favor independent schools, given that parties will have definite agendas and won't necessarily be tolerant of ideas and actions that run counter to party orthodoxy. Suppose that the Democratic Socialists of America (DSA) organized a school. Right now, the DSA has opted to campaign vigorously for Bernie Sanders to become president. If I taught a class and strongly argued against such a strategy, would I be free to do so. History suggests that the answer is no.

I realize that truly independent schools might be impossible, so the goal would be to make them as autonomous as possible, along the lines of the better Workers' Centers in the United States, such as the Chinese Staff & Workers' Association in New York City and the Coalition of Immokalee Workers in Florida. Financial support should come from students, members of the parent organization, contributions from supporters, and no-strings-attached donations from labor unions and other groups committed to radical social change.

One of the early efforts, again in the United States, to provide independent radical education for the working class was the Brookwood Labor College, which opened in the early 1920s. The founders of the school were committed to four principles: “The founders believed in four tenets: “First, that a new social order is needed and is coming—in fact, that it is already on the way. Second, that education will not only hasten its coming, but will reduce to a minimum and perhaps do away entirely with a resort to violent methods. Third, that the workers are the ones who will usher in this new order. Fourth, that there is immediate need for a workers’ college with a broad curriculum, located amid healthy country surroundings, where the students can completely apply themselves to the task at hand.”

Brookwood closed in 1937, done it by a host of problems, including attacks from the AFL and the deepening of the Great Depression. But during its run, it did good work and sent forth a large number of educated, committed radicals, including Ella Baker and Len De Caux.

There were and still are schools aimed at the liberation of the working class, such as the famous Highlander Folk School in Tennessee, now called the Highlander Research and Education Center. However, what is interesting about Brookwood is that recently, a New Brookwood Labor College came to life this year (2019) in Minnesota. It “strives to address racial, economic, and social imbalances of power by educating workers into their class. We are creating an inclusive labor movement that uses the power of organization not merely to lift individual workers or worksites, but to create a more just world.” We should all hope that this effort succeeds and is replicated often, here and around the world.

Mother Jones, famous champion of workers, said, “Sit down and read. Educate yourself for the coming conflicts.” The importance of a radical education cannot be overstated. We need a lot more of it, the sooner the better.

This essay is adapted in part from Yates’ book, *Can the Working Class Change the World?*

5. WHAT IS WORKERS' EDUCATION?

Workers' Education uses the traditions and methodology of Popular Education – with a specific goal of building working class organisations for social change.

For the purposes of this handbook we refer to the traditions of Popular Education applied to this sphere as Workers' and community activists' Education.

Worker education can strengthen your organisation and increase its effectiveness. It can do this by:

Involving, informing and activating members and constituencies. It is often said that a democratically controlled organisation is as strong as its members. The more involved members are, the stronger it is likely to be. Members will also need to know about policies and the reasons for these policies. Membership education programmes, mass rallies, workplace meetings, campaigns and social activities can all contribute to involvement. Any membership education programme must develop a well informed and active membership to support campaigns and struggles.

Building democratic organisation. Education programmes can encourage democratic organisation by ensuring members can use democratic procedures to influence policy and decisions. Active learning is a model for democratic decision making that can influence how meetings are organised.

Making members aware of their rights. Members need to know about their rights, if these rights are to be enforced at the workplace. Take, for example, the right to know about the hazards of the workplace. This right is now recognized in law in most countries and in international standards. Unless worker representatives and officials are aware of these rights they are unlikely to be enforced. Education programmes can ensure that workers know about their rights and plan how to enforce them

Equipping representatives/officials with the skills and knowledge to effectively represent the membership. Reps and officials need a wide range of skills and knowledge if they are to represent working

people effectively. Education programmes can ensure the development of key skills and knowledge. This in turn will be reflected in more effective bargaining and representation at work. The skills and knowledge base will be changing and not static. In many countries, for example, there is a new wave of anti worker activity being embarked upon. Reps and officials need to develop new skills to effectively deal with the new reality.

Furthering the political aims of working class, the poor and their organisations. Democratic organisation must always have wider political aims. Unions in particular have also shared these wider political aims. In the past these political aims have led to the formation of social democratic political parties in many European countries. In South Africa, the unions in the 1980's played a pivotal role in the fight against apartheid. Political union education played an important part in this struggle. This political education involved discussion about both the fight against the apartheid regime and the kind of society that would replace it. In the current world climate both conservative and social democratic parties are increasingly pursuing free market policies, which are often against the interests of working people and their families. This means that there is a strong case for including wider political and economic issues in worker education programmes.

Neo-liberal Capitalism is posing real problems for workers around the world. Increasing levels of privatisation of public services are affecting working people and their families. The casualisation of labour and increasing levels of part-time employment are undermining full time employment. Established standards of employment and pay are being undermined by unfair competition. Deregulation is also reducing hard won rights and standards. Capitalism also divides and fragments the working class between employed and unemployed; permanent workers and casuals, locals and foreign migrants etc.. We need to respond. Worker education can contribute by raising awareness of these issues and encouraging greater solidarity locally and internationally. Education must promote the building

of alliances with other groups in civil society fighting neo liberalism.

Strengthening the organisation through organising.

Strengthening the democratic worker organisation by organising more workers must be at the heart of all activity. New and old ways to organise workers and retain existing membership must be found. In some countries unions have set up organising schools or units. Education departments of unions and informal economy worker organisations must work closely together to link education activities together with organising.

Active learning and worker education

Active learning is a critical component of good worker education practice, for a number of reasons.

Democracy. Active learning is democratic. Participants are treated with respect and work together collectively to make decisions. This is a critical model for all our democracy work!

Equality. Educational courses designed on an active learning approach respects everyone's views and participants are treated equally. In the liberation

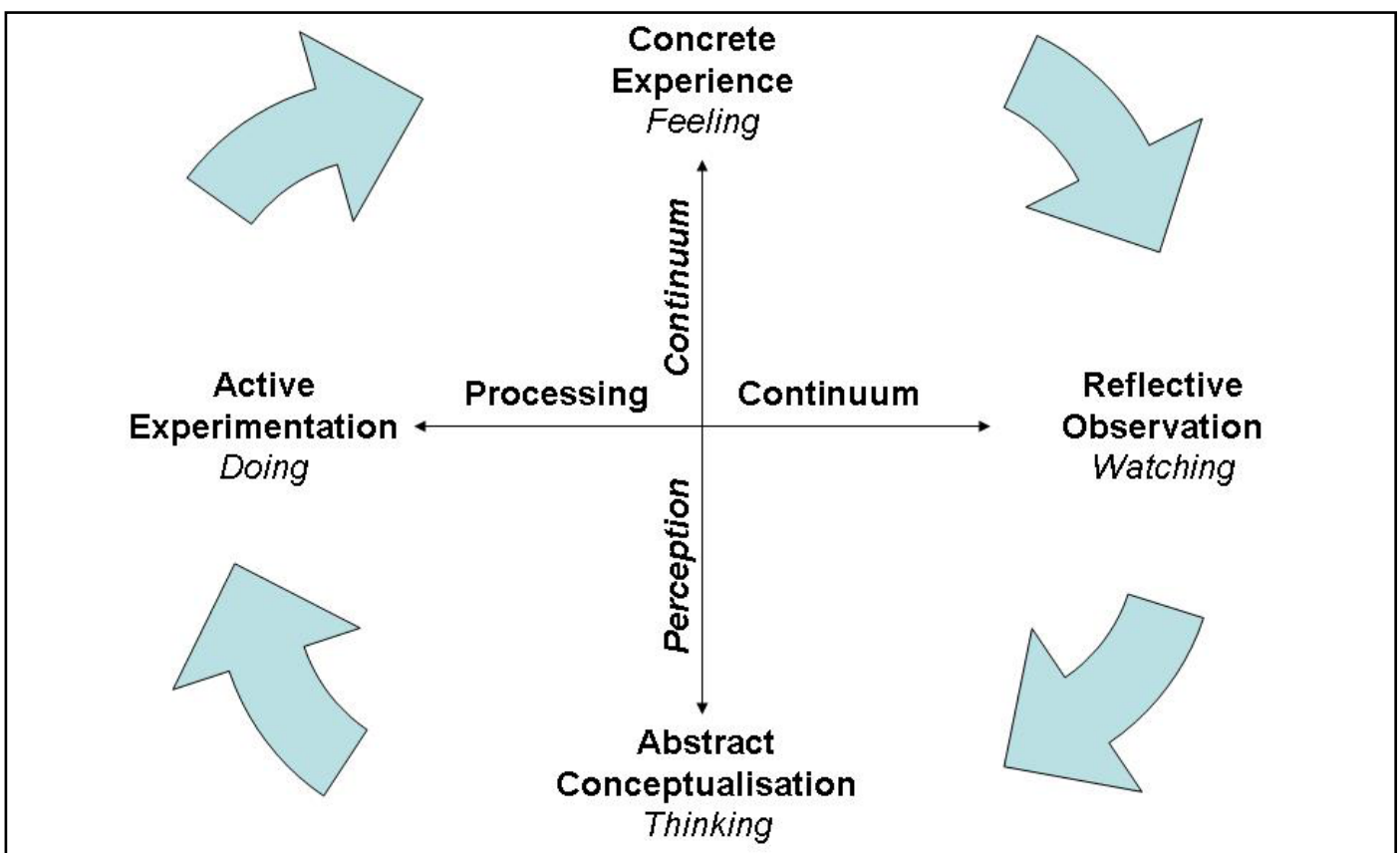
struggle we are fighting discrimination, prejudice, discrimination, injustice etc. Active learning can demonstrate by example how this can be done!

What is active learning?

Active learning is the name given to an educational approach that is based on participants discovering things out for themselves and learning from their own experiences. The technical term for this kind of learning is experiential learning. More commonly there are a number of terms used to describe active learning techniques. You may have come across some of the following descriptions:

- Learning by doing
- Discovery through participatory methods
- Small group teaching
- Student centre learning
- Study circle methods
- Participatory education
- Learner-centred education.

Kolb's learning cycle



7. TRADE UNION EDUCATION?

Since trade unions play an important role in the building of a movement, trade union education in the popular education mode can enable workers to respond to the economic, political and social changes and challenges of the world in which they live. It is a fast changing world, which demands a permanent process of learning in order to keep pace and respond to these changes.

Trade union education gives people the opportunity to learn the skills that enable them to promote and defend their interests at the work place and in society at large. It covers the problems they face in their everyday work, as well as the wider issues arising from the rights of workers to organise.

The objective of trade union education

The overall objective of trade union education is to contribute to the development of strong democratic unions with an informed membership. Education programmes can enhance the capability of members to participate in the decision - making of their unions, helping them to act effectively on national and international issues. The strength of a union depends

on the strength of its membership and on the quality of its members, individually and collectively. There is no doubt that the future of a union will, to a large extent, be determined by the availability of a dynamic education and training programme in which its members at all levels can participate.

Trade union education helps to increase membership

In the long run workers' education is one of the best and most profitable investments that unions can make. Trade union education is not an end in itself, but a means to more active recruitment and a better service to the members. It will not only result in increased membership and thus improved financial resources but, above all, encourage the growth of resources in terms of personnel – more and more union members will be able to actively share the responsibility of supporting and developing the activities of the union.



Care workers
union workshop
on organising,
NUCWOSA 2016

8. THE ROLE OF THE WORKER EDUCATOR

You do not need to be a top union official or NGO professional to assist workers in achieving the goals of workers' education, but you do need to be committed and willing to learn and teach others. It goes without saying that it is an asset in teaching if you like people and have a reasonably outgoing and confident personality.

Educators are not expected to be authorities or experts or have university degrees or speak good English. Their role is more that of a facilitator, organiser and counsellor. They have the responsibility to guide the participants in achieving something practical. To accomplish this task, the educator should be patient, tactful and sensitive to the needs of all the participants. S/he should be able to make contact rapidly with the participants and to create a friendly, informal atmosphere.

So much for the personal qualities. As far as the teaching qualities are concerned, we start with some explicit advice on your role as a discussion leader, because you will find yourself quite frequently in this position.

How to be a good discussion leader

It is difficult to say what the ideal degree of control of a discussion should be, for this depends to a large extent on the individual situation and circumstances of an educational activity.

Taking for granted that you have a reasonable knowledge of the issue under consideration, one of your main tasks will be to build the ideas and contributions received from the participants into a logical pattern. Leading a discussion also implies successfully steering the debate away from irrelevant notions, encouraging the more silent members of the group to participate, and quietening the over-talkative ones.

The quiet participant

A very important skill of a discussion leader is to

monitor the activity and involvement of quieter and more passive participants. Encouraging them to become the reporter in small group discussions is one technique, and to put direct questions to the participants by name is another. The latter, however, can be used only if you feel that the participant is confident enough to handle a direct question. Remember that the participant may be shy because of cultural or language problems.

The dominant participant

Another problem that demands a skillful discussion leader is the controlling of dominant participants by utilising the most effective technique that uses the group to neutralise him/her and thereby solve the problem. If this should fail, you will have to have a word, explaining carefully how s/he can best contribute to the well-balanced participation of all participants in the course.

How to structure a discussion

Unstructured discussions where no key points have been established or where irrelevant points are discussed at length fail to serve a useful educational purpose. If you are involved in a general discussion on a particular issue, it is advisable to consider the following:

- Identify the objective of your discussion and ensure that the key points will lead towards it.
- Structure the key points of your discussion in a logical order, going, for example, from the general to the individual, from the specific to the more general, from the past to the future or from the less important to the very important. Reinforce the key points by using the whiteboard, a flipchart, an overhead projector or other available aids.
- At the end of the discussion summarise the key issues and ask the participants to note them down.

- Ask the participants to give examples regarding the points under discussion and encourage them to raise the questions. Before replying yourself, throw the questions back to the group and have them find an answer. Try to limit your contribution to unanswered questions, to the analysis and summary of the key points.

Since the main job of a discussion leader is to activate the participants, and not to supply ready-made answers, the most general advice might be to try to develop a sound feeling for when to listen and when to talk.

The teaching hints on the following pages will in addition give you many ideas for successful group and discussion leading.

POSITIVE HINTS FOR GOOD EDUCATIONAL SESSIONS

How to create a good learning atmosphere

- Be positive minded when you enter the room and consider the participants to be interested and willing to learn
- Be friendly and, if you can, show a sense of humour. Try to create a co-operative and relaxed atmosphere in order to encourage trust, initiative, risk-taking and self-confidence
- Help people to feel at ease by giving them all the information they may require in a new place and in an unusual situation
- Make sure that the physical conditions (room, seating, light, equipment) are satisfactory.

How to create a good working relationship between the educator and the participants

- Establish eye-contact with your participants – don't look over their heads or somewhere into a corner
- Express confidence in the learners, encourage them to ask questions freely and help them build up self-confidence by reacting in a positive and reassuring way, either verbally or non-verbally (for example: 'that is a good/interesting question/point', or a friendly nodding of your head)
- Be sensitive to the needs of the participants and willing to listen to their questions, problems, joys, frustrations and aspirations; ask about their well-being outside the seminar
- Watch the faces of the participants to find out whether you or others have been understood and whether the session is proceeding too fast or too slowly
- Do not be frightened of silence – the ability to let someone have a few seconds to get going can be invaluable for the shy; keep in mind that quietness may be a result of cultural or language problems
- Try to avoid negative criticism as well as embarrassing or humiliating participants in word, tone or body language which will have a discouraging effect
- Be patient and tolerant
- Deal with individual problems which do not concern or interest the others privately during breaks or social time
- Observe the group dynamics, that is the interactions and behaviour of the participants within the group
- Review and assess your own role, your actions, your behaviour and your relationship with others from time to time
- Be concerned about individuals and their reactions, but also about the task you want to accomplish.
- Think of preparing evening relaxation options like films, videos, games, etc.

TEACHING HINTS

How to improve your teaching methods

- Be enthusiastic and optimistic in order to keep your participants interested
- Start on time and finish on time and if you cannot do so, let the participants have an explanation
- Prepare what you are going to say or do, and what you want the participants to do
- Change teaching aids and methods frequently in order to keep the learners' motivation and interest alive
- Use a personal experience occasionally to illustrate a point
- Try to draw out the shy and tactfully silence the over-talkative ones
- Direct questions back to the participants and make them think
- Ask for practical examples and practical experiences. ('Has anybody ever seen/heard/had...?' should be frequent questions)
- Promote active participation and encourage participants to express and exchange new ideas, new insights, different opinions and criticism openly, thereby stimulating creativity and active participation
- Allow times for new ideas to penetrate their minds
- Be flexible and open to ideas that may slightly change, but enrich your course design
- Review and recall frequently and in different ways what the participants are supposed to learn
- Make the participants feel that their contribution is of value, providing recognition and encouragement as often as possible, however, avoid overpraising or praising one individual too much
- Develop a sense of achievement among the participants

9. ADULT EDUCATION

In order to give some idea of what lies behind the teaching hints and suggestions mentioned in the preceding chapter, we refer below to some basic theories and observations that are fundamental in adult education and that will help understand the factors which assist learning or which could be detrimental to it.

THE PROCESS OF LEARNING

It is generally accepted that our brain is constructed in a way that provides the ability for life-long learning, and that this ability does not necessarily decline with age – though the speed at which information is assimilated will fluctuate, depending on the learner's age and prior knowledge. Many people in their sixties or seventies are still very well able to learn and think creatively.

One factor which facilitates the learning process for all adult learners is that they enter into education with greater experience and thus a wider frame of reference. They have a resource of knowledge on which new learning can and should be built upon.

MOTIVATION

Another factor is that adults are normally highly motivated to learn: they have a very developed "learning readiness". For example, when someone becomes a parent, he or she is generally eager to learn something about child development; similarly, when people become wage-earners and trade union members, their interest in labour questions will be much greater. Consciously or unconsciously most people go back to education because they feel a certain need for change, a change for the better normally – be it greater knowledge, the development of intellectual and physical skills, a better understanding of others and oneself, better social relationships or, in short, a better situation in life and in society. The adult's awareness of a need is one of the basic elements of learning motivation.

Well-planned and well implemented trade union education can help satisfy these needs. The better they are met, the more successful the results of the training efforts will be.

HOW TO INCREASE MOTIVATION

Motivation can be increased or developed by

- providing workers with clear information on the objectives of the educational activity;
- linking learning issues with real life situations and with the needs defined by workers;
- developing a sense of responsibility by fostering active participation;
- creating a positive group atmosphere and encouraging the sharing of experiences;
- giving frequent and immediate recognition for an achievement, for active participation or for a good contribution made by a participant

LEARNING BARRIERS

There are, however, also barriers that can have a negative effect on an adult's efforts to learn:

Many adults when returning to education find it difficult or even impossible to speak up in class. The reason for this might be unhappy experiences or failure at school, the fear of looking stupid in front of others or just the new and unusual situation. A number of workers come to their first trade union course or seminar with feelings of anxiety, a lack of self-confidence or with an exaggerated respect for authority.

Adults also have a tendency to reject or withdraw from situations that are new to them and which require change in habits and attitudes. Learning can mean very profound changes in knowledge, understanding, feelings and attitudes. It should also be mentioned that threats, negative criticism or the pressure of competition between participants have a negative influence on the learning process and may discourage the learner from active participation.

It is useful to keep these factors in mind, especially at the beginning of a course or seminar when the building up of an atmosphere of trust is essential.

HOW DO PEOPLE LEARN?

Learning is a process of taking in and assimilating information by different “channels”, that is by using the different senses such as hearing or sight. It is also known that the most efficient way in which people take in information differs from one person to another, and it is, therefore, important to use different teaching methods in order to open up different entry channels to the mind. The more senses involved, the greater is the retention of information.

Learning by doing

The highest rate of retention – that is the ability to remember and reproduce a piece of information – is obtained if, besides using our senses, learning is combined with doing, that means with practical exercise. By the way, learning is retained longer if it is immediately transferred into practical action!

Learning by reinforcement

To facilitate and accelerate the learning process, learners need a reassurance or reinforcement. If you praise or reward a person for something he or she has done, that person is likely to repeat the behaviour because the outcome has been enjoyable. To be most effective, praise or rewards must come soon after the learner has performed well.

Learning by repetition

A well-known device to help people retain information is repetition. However, repetition should not be confused with drill. A better form of repetition is to present the same problem in different ways and in different situations.

These findings, described in this chapter is a very abbreviated way, have led to new approach in education techniques – **the active learning approach**

Memory and learning methods

1. Ears only



20%
retained

2. Eyes only



30%
retained

3. Ears + eyes



50%
retained

4. Ears + eyes + discussion



70%
retained

5. Ears + eyes + discussion + reproduction + use



90%
retained

ILO: Workers' education and its techniques

10. PLANNING AN EDUCATIONAL ACTIVITY

Although each educational event will be of a different nature, some general advice on the planning process may be helpful in designing your specific course or seminar. The following key points and steps – which will rarely be dealt with in the same systematic order – represent a basic structure that can be adapted to the individual circumstances.

INITIAL CONSIDERATIONS

To be successful and interesting, an educational activity has to be well planned and prepared in advance. In this initial planning period you have to consider whether **your organisation has established a strategic development plan or a general education programme**. You will have to make sure that the activity you want to plan fits into the given programme and meets its needs and requirements.

Thought will also have to be given to the often limited financial resources available and how to use them in a way that guarantees a maximum of success.

In order to maintain the proper functioning of an education programme it is advisable to establish an education committee which is responsible for monitoring different educational activities as well as planning for the future.

NEEDS ASSESSMENT

Educational activities are usually requested in response to certain identifiable problems and needs, for example:

- Non-members must be motivated to join
- Members need more information on what the organisation offers or the way in which it operates
- Members have to be motivated to participate more actively in union matters
- Shop stewards/delegates do not know their jobs or do them ineffectively
- Leaders need to know more about the negotiation of agreements

INITIAL CONSIDERATIONS

NEEDS ASSESSMENT

OBJECTIVES

TARGET GROUP

TYPE and LENGTH

VENUE

CONTENTS

RESOURCE PERSONS

METHODS and MATERIAL

EVALUATION

- Women want to be educated to gain confidence and leadership skills
- Educators have to be trained to educate their fellow members
- Grievances need to be identified and procedures to solve them explained

We should, however, also recognise that not all needs and problems your organisation faces can be met through an education programme.

OBJECTIVES

Having identified the most pressing needs and problems of your organisation, you will now have to turn them into aims and objectives of the activity you plan. The reason for specifying objectives is to make it clear to yourself and to the course members where you are going and what you want to achieve.

The educator needs clear objectives in order;

- to plan the contents;
- to choose the participants;
- to decide the place, length, form and other structural requirements of the activity and
- to choose appropriate teaching methods.

Clearly expressed objectives help the participants

- to gain clear ideas of what they are expected to do and what they are supposed to gain;
- to avoid setting unrealistic expectations and
- to reinforce their motivation.

Finally, well-defined objectives provide the educator and the participants with a means of judging and revising a course/programme while it continues, and of evaluating its effectiveness once it has been completed

Out of a choice of possible aims that your organisation might want to achieve by training its members, here are some examples:

- To increase the power of workers in society
- To strengthen union branches
- To instil a sense of interest, belonging and loyalty amongst members.
- To teach, reinforce or modify specific skills that are needed in everyday work.

These are general objectives that need to be broken down into more specific objectives which clearly define the purpose of the individual activity, that is, what the union and the educator expect to achieve and what the participants are supposed to know or be able to do at the end of an activity. For example, if the general objective is “to teach, reinforce or modify specific skills”, a specific aim would be “to help officials run a union meeting”.

It goes without saying that the objectives chosen should be of value to the participants and accord with their level and experience. They should neither ask too much nor too little of them. If there is any discrepancy in this respect, you should “democratically negotiate” the objective with the participants at the beginning of the programme.

Objectives should

- Fit into the general education programme and policy and respond to its needs as well as to those of its members.
- Be clearly defined and made known to the participants;
- Be set in accordance with the level and the experience of the learners;
- Be broken down into specific objectives;
- Be negotiable

TARGET GROUP

In order to establish systematic programmes on a continuous basis that correspond to members’ needs, it is important to select the right people for the right training. A careful selection of participants is also necessary in order to make the best possible use of available resources.

Since there are different target groups, it is desirable to divide members with different educational needs into recognisable groups which could be described as follows:

a) Rank-and-file members for whom education is needed in order to develop their understanding of the principles, objectives and functions of your organisation. They need to be informed about their obligations, their responsibilities and the rights as members.

b) Shop stewards, area reps, regional representatives and other members serving in various voluntary offices, helping it in its basic tasks of organising the workers, protecting their interests and improving their conditions of employment. This group needs to be trained in basic administrative skills as well as more advanced.

These members often also need to develop a better understanding of general subjects such as basic economics, civic responsibility, current social and political developments. In addition, there are members who are elected to perform specific tasks within the workplace and the union, and who need specialised training in fields like media, occupational health and safety, campaigns and education.

c) Trade union officials who work full time for their union in different capacities together with senior national and regional officers. This group will require courses of a more specialised nature. The topics will include collective bargaining, labour legislation, political economy, communication and administration. It is important to tackle the general subjects mentioned as part of the local representatives' training.

d) Specific groups where individuals may have a different background and different tasks, but where the problems and the group interests are common like women, youth, illiterate members, migrant workers and those drawn from particular sectors.

In any case there has to be a selection procedure which matches the member's background and experience with the appropriate course.

At the same time this selection procedure has to ensure equal opportunities between male and female candidates.

Preference should be given to applicants who

- are genuinely interested in education (and not in days off);
- have shown commitment ;
- are open to new ideas;
- are willing and (hopefully) able to apply and pass on to others what they have learned

If time permits, try to get some idea of the background and experience of the participants in advance by sending them a questionnaire. This will enable you to better meet their needs when designing the educational activity.

Maintenance of records of course participants, indicating in particular appropriate follow-up activities, is useful in order to determine the right candidates for further education.

TYPE and LENGTH

Workers' education is not limited to any specific type or length of course or training session, although the availability of premises or funds may be determining factors.

Whatever form is chosen it should ideally be part of a continuing programme and not a once-off event.

Duration

An educational activity can take all day or occupy only a part of a day, it may run on consecutive days or one day each week. It can be weekend workshops or seminars that last three days, a week or several weeks. It should also be remembered that there are many educational activities which require little or no financial resources to organize

The different forms of education

Out of the wide range of possible forms of education, the choice should be based upon what is best suited to the union's objectives, the needs of the participants, the topics to be dealt with and, of course, to the finances and time available. Here are some examples:

a) Education meetings

At regular or occasional membership meetings, issues and problems can be tackled using different educational techniques, such as group discussions around a clearly defined task, a short introductory talk followed by questions and discussions. The advantage is that this type of educational activity can reach a large number of members. It can help make meetings more interesting and successful at a minimal extra cost.

b) Special educational sessions for membership

A regular get-together could be on the basis of, for example, two hours once a week, continuing for several weeks or months. This activity corresponds in some ways to the study-circle method described below. Costing relatively little, these sessions are best for intensive work on a special subject and for training groups in particular skills.

c) Weekend courses/seminars

This form of activity can be residential or non-residential, but should in any case be run reasonably close to work-place or homes of the participants in order to prevent long and time-consuming trips. Weekend courses/seminars are especially useful for getting new members interested in active participation in the union.

d) Longer seminars of several days or weeks

A one week or even longer seminar – very often held on a residential basis – can have several advantages (which will be dealt with later in this chapter), in particular giving the participants an opportunity to study the problems they have to deal with in more detail and depth. They are of course, much more expensive and attention should, therefore, be paid to careful planning and making sure that a maximum of training and learning is received for the money spent.

Non-residential or residential?

The decision as to whether a non-residential or a residential arrangement should be considered depends both on the resources of the union and on the availability of participants and resource people.

Residential activities encourage in particular:

- Concentrated work and extensive discussions on trade union topics
- Undisturbed reading and writing
- Closer contacts among the participants and between educators and participants
- Many informal educational and social activities
- The practicing of democracy in a small community

e) Self-study

This is a valuable method of learning it, for example, someone lives in a remote place with no opportunity to join in union activities. This implies, however, that the interested person has access to appropriate education materials and the possibility of contacting a trade union educator in order to help direct his/her studies.

Mention should be made of the possibility of pairing with another member in order to stimulate self-study and make it more interesting.

This can be facilitated and supported by online courses but this will require participants to have computer and Internet access.

Obstacles to the participation of women

It is important to bear in mind the particular needs of women members when considering the type and length of educational activities. For example, activities held in the evening immediately after work are likely to disqualify women from attending because they are usually expected to be in the home preparing the evening meal and looking after the children. In certain circumstances residential courses are also difficult for women to attend because they are not permitted by husbands or society to be away from home at night or because small children need to be taken care of. Women are also more vulnerable to crime and violence in our communities.

Unions should make all efforts to enable women to participate in education by offering special arrangements and/or child care facilities.



VENUE

Since education centres are scarce in many countries, the choice of a suitable venue for an educational activity depends very much on local circumstances and on the resources available.

Where to run a course/ seminar

Every effort should be made to ensure that the training takes place in clean and reasonably comfortable surroundings. Preferably, the venue should be in a place that can be fairly easily reached by public transport. Where trade unions themselves are unable to provide suitable facilities, use could be made of cultural, pastoral, social or community centres, universities, extra mural institutions, colleges and libraries.

An education venue should, if at all possible, be visited in advance to make sure that it is suitable for the purpose. Once having decided upon a venue, it is advisable to book well in advance to avoid any problem over dates. At the same time, you should make arrangements for the provision of meals, coffee, tea or other refreshments.

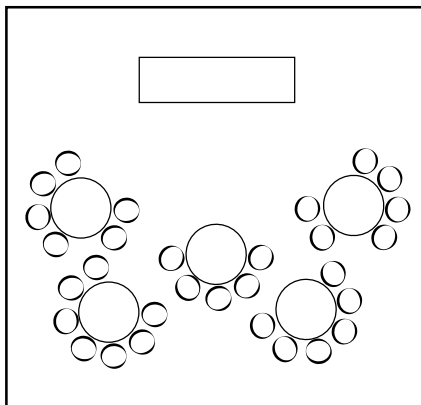
The meeting rooms

As far as rooms are concerned, the ideal solution is a locality with one big room for general sessions and several small rooms for group discussion or small group work. However, a building with a room large enough for the course to be split into different working groups would also be adequate.

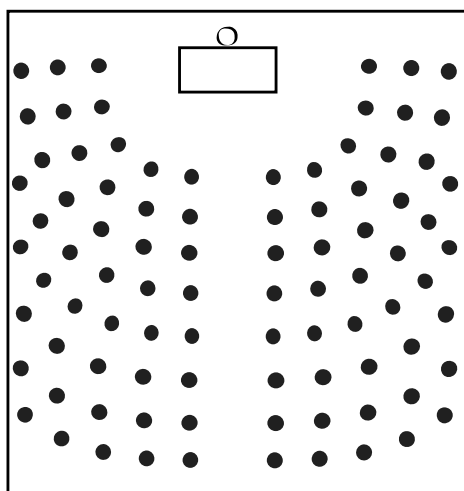
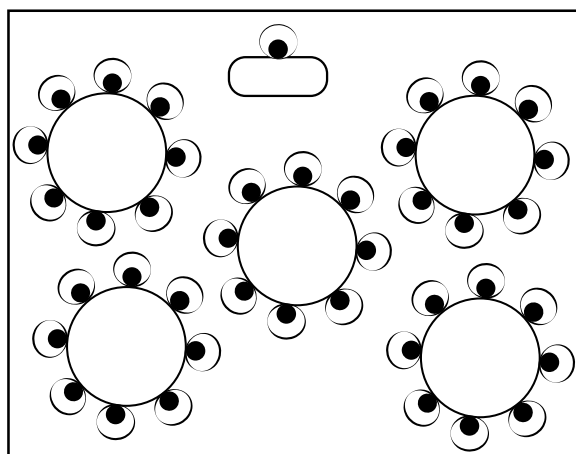
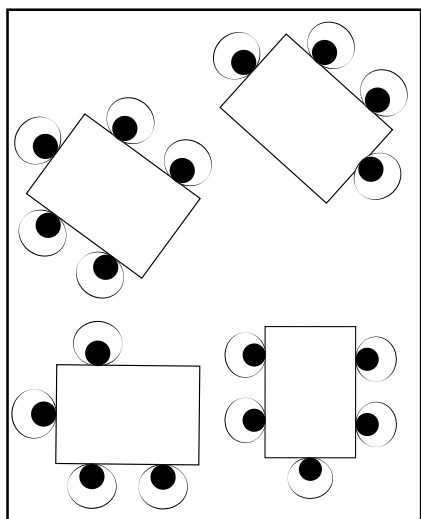
Rooms should have good light, be sufficiently ventilated and protected from too much noise. They should be provided with a whiteboard or flip-chart, a wall for displaying activity posters and, preferably, equipment and facilities for other audio-visual aids like slides, films or video projections. **Make sure that there is an electrical connection and check that it works!** If the course/seminar is residential, adequate possibilities should be provided for the participants to meet after the sessions.

Seating arrangements

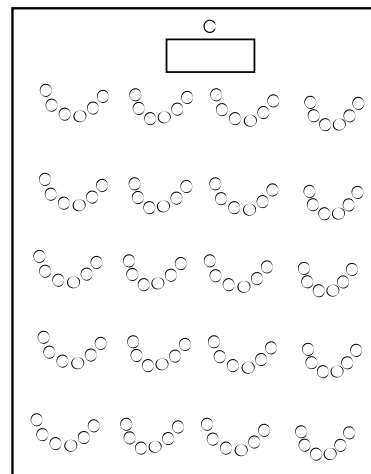
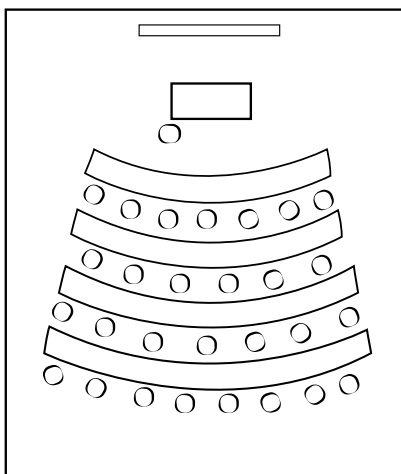
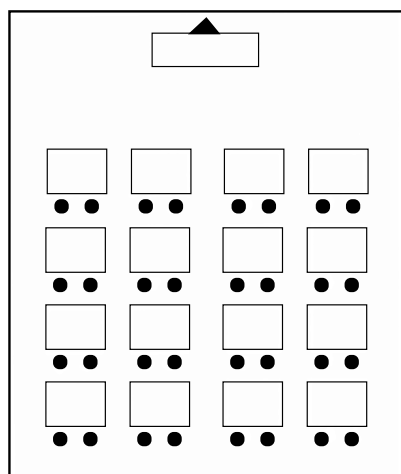
Since you might have some influence on the seating plan take into consideration that some arrangements are better than others or more suitable to a specific teaching situation. A well-arranged meeting room contributes considerably to the well-being of the participants and has a stimulating effect on learning. There are some proposals for seating arrangements on the following pages.



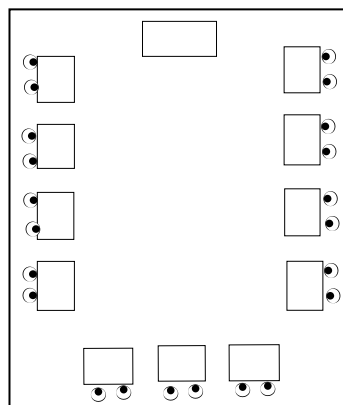
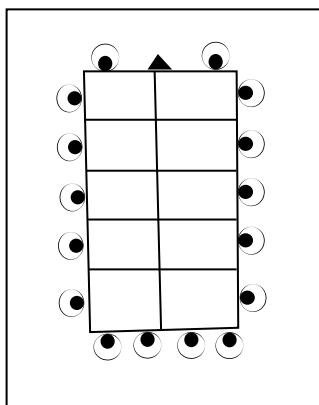
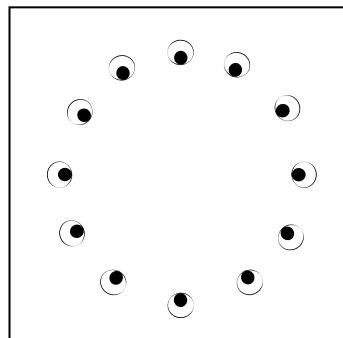
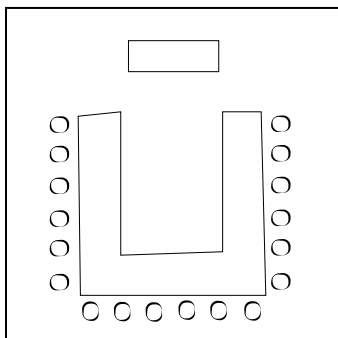
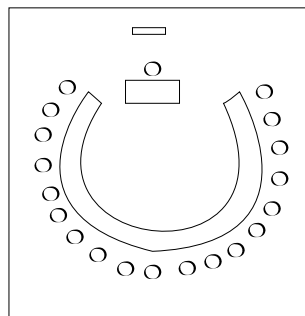
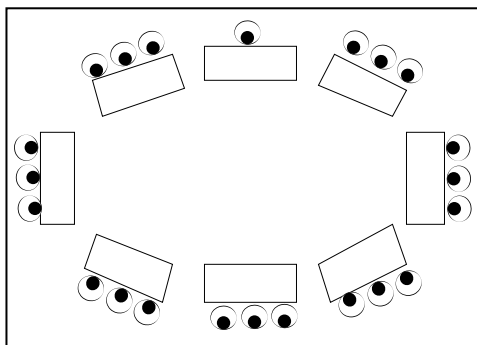
SEATING PATTERNS FOR DISCUSSION GROUPS



SEATING PATTERNS FOR LARGE GROUPS



SEATING PATTERNS FOR PLENARY SESSIONS



CONTENTS

The content of an education activity is based on topics and subjects that concern union members, such as union organisation, labour relations, social and economic questions and many other issues related to work and the union. These issues are dealt with in such a way as to achieve the previously defined objectives.

The content varies according to the objectives and the duties of the participants involved. However, some standard requirements should be met when determining the actual subjects to be covered.

- **The contents must cover subjects and activities which will enable the participants to achieve the set objectives.**

- **The contents of a course/seminar should have relevance to the participants' every-day life,** the problems they face or feel they are likely to encounter at the work place. This increases their motivation for learning, helps them to understand new issues, encourages them to develop their ideas and to acquire new skills.
- **The contents should be presented in an appropriate order,** for example from the known to the unknown, from personal experiences to more general values or from concrete examples to more abstract issues.

Example: If the objective of a session is to develop strategies for increased women's participation in the union, it is advisable to start with a session on the problems women face at home or at their work place in order to link the well-known with the uncertain factors.

- **The content can be graded into different categories of importance.** Although we favour courses that are run in a democratic and flexible way, we feel that it is necessary to decide beforehand on what has to be covered, what would be useful, and what could be felt without losing sight of the objectives.
- **The contents should neither be too general nor too concentrated.** In order to allow the participants to feel that they have achieved something at each session and that they are making progress step by step, the content should be broken down into small units of learning.

Chapter 9 on the the “Structure of a Session” will show you how the content becomes part of a session in the form of an activity.

Once the contents of your educational activity are known, it is time to draft programme and decide upon the subjects the activities should cover.

At this point one should consider whether the educator himself/herself will be able to cover all sessions or whether a suitable resource person has to be looked for.

RESOURCE PERSONS

It is often desirable or necessary to use people who are not course leaders to lead a session during a seminar.

Resource persons could be:

- specialist union officials, such as general secretaries, and treasurers;
- teachers in specialist, subjects such as economics, health, from schools, technical institutes, universities;
- officials from women’s organisations, youth groups etc.;
- government officials from ministries, departments of labour, health, statistics etc.

It is important, of course, to make sure that these people are actually qualified to deal with the topic. It is also important to see that they are sympathetic to workers and trade unions. However, it is even more important that the resource person is thoroughly briefed on the session:

- What are the objectives for the session?
- What contents/topics are to be covered?
- What is the time frame?
- What kind of participants are involved in the seminar?
- Will there be background material or handouts to be circulated beforehand?

But most or all it is essential that resource people are encouraged to adopt active learning methods.

METHODS and MATERIALS

Which is the best way of putting the message over?

Out of the various methods presented in Chapter 11, choices have to be made on which are the most suitable ones for the subject to be learned.

You will also have to think about the kind of study material or teaching aids you will need. In Chapter 12 there is some useful information in this respect.

EVALUATION

Each educational activity needs to be evaluated by the participants as well as by the educator. An adequate evaluation should therefore be included in your planning process. Chapter 15 will give you more detailed information on how this difficult task can be dealt with.

11. METHODS AND TECHNIQUES

Although there is no golden rule regarding the choice of methods, some techniques are certainly better suited than others to reach a particular goal in a particular educational situation. Each method has its advantages and disadvantages, and very often a combination of several techniques is needed for all-rounded learning.

For many years, the formal lecture was the most generally used technique in trade union education. However, for the past few decades more and more union educators have moved towards the active learning approach, also known as the student-centred, learner-centred, participatory or active learning approach. This implies that methods are used which stimulate learning and promote a high degree of collective and individual participation in the learning experience, guaranteeing at the same time a much high level of retention.

MAIN ELEMENTS OF THE ACTIVE LEARNING APPROACH

- The learning process starts from and builds on the experience of the participants
- Participants play an active part in analyzing and solving problems and developing strategies
- The activities on the course are related to the activities of members at the work place; they are designed in a way that allows participants to share their experience and learn from each other
- It involves the development of practical skills that are essential

While we prefer the active learning approach in our education programmes, this does not mean that there is no place for lectures. Under certain circumstances lectures have their value which should not be ignored. This method will be dealt with later.

It is unfortunately beyond the capacity of this handbook to cover all existing active methods in detail. We will, however, in the following pages present some of the techniques that have proved to

be suitable and successful in trade union education. We also include the study circle in this chapter, although it is not a method to be used in a seminar but a concept on its own that is based on group work.

GROUP WORK

Group work in all its varieties (small discussion groups, informal groups, buzz-groups, case study, role-play, study-circle etc.) has taken a prominent place in trade union and community training activities.

Group work offers many advantages:

The main advantage of group work is that it gets more people actively involved. Due to the small size of the group, members have the possibility of expressing themselves more freely, of comparing experiences and of finding different ways of problem solving.

Since group work usually takes place in an informal setting, it is a great help in overcoming the initial shyness of participants, especially those who are not used to speaking in public.

Many group work activities require a member to take the role of chairperson, discussion leader or reporter. This means that, besides the actual aims of the group work, important skills like public speaking, recording and writing are developed.

Group work helps people understand how to work co-operatively so that at meetings members can more easily find a way of reaching a joint decision. It also builds up self-confidence and develops the ability to take responsibility. Group work instils a sense of group identity and well-being which is an important factor in the learning process.

Another positive aspect of group work is the fact that it generally requires very little equipment. It can be adapted to a great variety of learning situations, and last but not least, it has proved to be very helpful in overcoming difficulties when participants speak different languages or turn out to have different levels of understanding.

ADVANTAGES OF GROUP WORK

- Gets people involved and makes them active participants
- Gives participants practice in self expression
- Fosters working cooperatively
- Builds up self-confidence
- Encourages a sense of responsibility
- Permits a pooling of experiences, views and knowledge
- Ensures a fuller understanding of problems and helps to solve them
- Prepares the way for useful social action

The Size of the Group

It is risky to make a general statement on what would be the best size of a group. Preferably there should be 4-6 and never more than 10 participants in a group. For some activities work in pairs can be an adequate technique.

DISCUSSION GROUPS

The most widely used type of group work is the discussion group. This technique, also known as the 'small group' or 'buzz group' method, consists of dividing a large class or meeting into several smaller groups in order to obtain increased participation. Group discussion is an organized conversation where the group members examine problems, exchange ideas and experiences, raise questions express agreement or disagreement with an option.

Small Informal Group

In large courses where for different reasons it would be difficult to form groups, increased participation can be obtained by breaking up into small informal groups. This method is useful to break up a lecture, giving the participants an opportunity to clarify issues or to test statements in the light of their own experience. The small informal group needs no special structure. No special seating arrangements has to be prepared but the participants are asked to form small group by just turning their chairs or getting closer together as per circumstances permit in order to discuss issues previously raised by the lecturer.

HOW TO MANAGE GROUPS

- Give participants the task of discussing a topic or problem which has previously been introduced. This introduction can be made in the form of a short talk, background information, a workplace report, some clearly defined questions, a provocative statement, an audio-visual programme (slides, film, video) or the written presentation of a practical case. Each group may be given a different question to discuss or they may all examine the same topic. (See sample activity sheet on next page).
- Ensure that the task is manageable for the participants.
- Make sure that the task is set clearly, preferably in a written form with a copy available for everyone involved, and that it is understood by all members.
- Prompt the group to choose a chairperson or discussion leader.
- Ask the group to have one member to act as a reporter whose task it is to sum up the results of the group's discussion.
- It is a helpful method to visualize the results using boards, flipcharts, wallpaper, digitally projected on to a screen etc. and report these results back to the whole group when it reassembles.
- Encourage groups to rotate the role of the chairperson and reporter so that this valuable training experience is shared.
- Set a time limit for informing group members when they should be ready for reporting back to the whole seminar/course.
- Change the composition of groups for different sessions in order to promote exchanges and avoid possible competition between groups.
- At the end of the reports from the different groups in a plenary session, the educator or the group reporter should ensure that all group members are given a chance to add information to the report.
- After all groups have reported their results, the educator should feed in relevant information that did not emerge from the group work and summarise the results. The implications for action should form an essential part of the summary.

EXAMPLE OF GROUP DISCUSSION ACTIVITY

ACTIVITY SHEET
<p>AIMS:</p> <ul style="list-style-type: none"> – to identify the range of health and safety problems encountered by workers – to think about the causes of those problems – to begin to plan strategies to deal with the problems <p>TASKS:</p> <ul style="list-style-type: none"> – Choose a chairperson and someone who will report back to the plenary. – Structure the workshop in accordance with the time indicated. – Discuss the following questions, and summarise your groups view on a flipchart. – In a small group, choose two health and safety problems which affect the workers you represent. Prepare a report for the rest of the course, outlining the following: <ol style="list-style-type: none"> 1. What are the problems? 2. How were they caused? 3. How do you think they could be removed?

2. STUDY CIRCLES

We are bringing in the study circle method here as a form of group work, while at the same time recognising that it is an overall education methodology.

The idea dates back to the end of the last century when workers in Sweden used them as a means of overcoming the lack of education and social assistance for the working class.

Study circles rest on the training of groups of educators who go into their place of work or communities and organize study groups. The method is now being increasingly adopted, often in modified forms, in community and trade union education all over the world. It is a most valuable learning method especially from groups of members who have had little or no experience in trade union work and for educationally disadvantaged groups.

Study circle assets

The advantage of this approach is that a lot of people can receive a basic grounding in trade union affairs and various topics relatively quickly and at a modest cost. The skills that study circle participants learn can be adapted and used to tackle a range of issues which people face at work and in their communities. Participating in a study circle gives people the self-confidence and power to resolve certain problems on their own without having to wait for an expert.

Procedure

The study circle method is based upon the training of study circle leaders, who are drawn from the workplace or community. They are not expected to have any special qualifications in order to participate in the course but they must be motivated to want to assist people at their place of work through an education programme.

The method of training is geared towards preparing the study circle leaders to understand the whys and

wherefore of group learning techniques. The work in a study circle usually centres around a book or written materials prepared for and adjusted to the requirements and methods used in the circle. The training usually lasts for two weeks.

Having completed the course, the participants are expected to return to their own workplace or community and establish study circle groups of between 5 and 10 persons who jointly decide to undertake a period of study around the subjected covered in the booklet. Study circles are usually expected to meet for 20-24 hours and participants can decide how to arrange their hours.

Each study circle is a self-learning units which received some assistance from the study circle leader or anyone else the participants might like to call in to help.

CHARACTERISTICS OF A STUDY CIRCLE

- Everybody feels s/he belongs to the group
- Everybody is accepted by the group
- Everybody is actively taking part in the discussions
- Different ideas and opinions are respected
- The leader is part of the group and equal with the rest
- Planning is done jointly
- Responsibility is shared by the members
- Problems and other joint affairs are settled between the group members
- Talks, discussions and analysis form the basis of the work
- Evaluation of the results is done in co-operation

3. ROLE-PLAY

Role-play is a means of simulating a situation or an incident of everyday community, union or working life in order to explore problems and to centre group discussions around a concrete experience. The simulation of a real situation makes learning more intensive than presenting the same elements in an abstract way.

In a role-play, participants are asked to adopt roles and “act out” pre-given situations. This does not mean acting in a theatrical way, but presenting practical examples of how to react or handle things in different situations. For example, it might be handling a grievance, which starts by investigating a member’s problem, followed by negotiations between management and employees’ representatives to solve the problem.

The learning effect of role-play

Role-play enables participants to learn by doing, through imitation, feedback, analysis and reflection. It has been found to be a very effective tool for developing skills that enable the participants to tackle more effectively the issues and problems they are confronted with in the work place. All interviewing and negotiating exercises are particularly suitable for role-play activities. The skills practiced include public speaking, defending a viewpoint, communicating with others, negotiating or settling disputes.

The “actors” in a role-play do not necessarily have to play roles that are identical with their real life position. On the contrary, they should occasionally slip into a role which is strange to them. In the beginning role-playing usually needs some encouragement, but once accepted by the participants they normally find it very stimulating. In fact, some people will play their role so well and with such dedication that they may be considered as “nasty” or “evil”. Therefore, after role-play, participants should always be given sufficient time to come out of their role and get back to normal relationships and conditions.

Preparing a role-play

A role-play must be carefully worked out in advance with clearly defined learning objectives in mind. Information on the background, the problem and the critical incident should be given, but only the essential

points for the development of the situation should be mentioned. Adequate time should be allowed for preparation of the case that is to be enacted.

A role-play should be set up in a way that enables the rest of the group to hear and see what is going on. This should take the form of briefs for the role-players to avoid participants straying away from the main issues of concern in the role-play. Those not participating in the role-play will act as observers who can take an active part in the discussion that follows the role-play and draw conclusions from it.

Sometimes it may be preferable that role-play is done in pairs or smaller groups rather than in front of the whole seminar.

Assessment

After the role-play it is essential to first have the actors make a self-assessment and ask them how they felt in the role in order to bring them “back to earth” thereafter all participants should reflect on the experience through questions and discussion and analyse what they have learned from the role-play. It will then be the task of the educator to structure this outcome and draw out conclusions.

It is important that the educator has a good knowledge of the technique as well as the subject understudy and that s/he is confident about running the exercises.

RECOMMENDATIONS ON THE USE OF ROLE-PLAY

Preparations	During the exercise	After the role-play
<ul style="list-style-type: none"> • Make sure that the situation you want to be enacted is relevant to real trade union or community life. • Prepare written educators notes with all necessary instructions. These instructions should be precise without being over-detailed. (See example below). • Try to involve as many participants as possible. • Ensure enough time for the exercise and for the preparation of the role-play. • Check that all the material and equipment required are available. 	<ul style="list-style-type: none"> • Explain the learning objectives to the participants. • Make sure that all the “actors” understand their roles. In some cases all the briefing notes for the participants should not be disclosed to all the actors – only those relevant to their roles. • Monitor the progress of the role-play closely and make notes for improvements or changes that seem to be advisable. • Be prepared to stop the exercise in the case that the learning outcome does not correspond to the objectives, or if participants are becoming unduly involved or upset. The exercise can continue after having cleared the situation. 	<ul style="list-style-type: none"> • First allow the “actors” to self assess the exercise and the role they played in it and give them sufficient time to get back to their real personality. • Then ask the observers to make an assessment of the play referring to the objectives of the exercise. • If the outcome is unsatisfactory, analyse why the exercise went wrong. • Structure the outcome and draw conclusions. • Note all the details concerning amendments or variations for future use. • Make an assessment of the exercise.

EXAMPLE OF ROLE-PLAY ACTIVITY

ACTIVITY SHEET

In a group, play the roles of :

- one shopsteward
- one worker with a grievance
- observers.

Shopsteward to interview worker and observers to evaluate

Briefing for Shopsteward

You are the shopsteward for the security department of Rainbow Chickens. There are 20 guards in your constituency. The manager has laid down procedures about drinking on duty. For a first offence you will be sent home and lose pay for that shift.

There is a grievance procedure which allows shopstewards to take up grievances.

Do not read the briefing for the complainant.

Briefing for complainant – Mr. Khumalo

You are a security guard at Rainbow Chickens. On Thursday 7th June 1998 you arrived at work at 8h00 instead of 6h00. The reason was that you had been drinking the night before and could not wake up in time. However, you were not drunk when you arrived because you had slept off the effects of the liquor.

When you arrived you found the Chief Security Officer at the gate. Another security guard (Mr. J. Dlamini) was also present. He is a union member. The security officer (Mr. Coetzee) asks why you are late, but before you can answer he accuses you of being drunk.

He tells you to immediately leave work and only come back tomorrow. He says you will lose pay for the full shift. You tried to tell him that you were late because of a personal problem with your wife. You have never been accused of being drunk on duty before.

You now complain to your shopsteward that this was unfair and that you should be paid for the day. You tell the shopsteward:

you were late because of a personal problem with your wife but you do not want to reveal the details you deny drinking except for one beer but say that you took a lot of cough mixture during the night because of a cold.

Briefing for Observers

- Did the shopsteward ask all the relevant questions?
- Did the shopsteward get to the true story?

4. SIMULATION

Simulation is a variation of the role-play method. In this exercise only the situation is pre-arranged, but no specific characteristics of the persons involved are given to the participants. Simulation is more spontaneous acting out of a situation. It is good in training people to undertake specific duties and, like role-play it represents dynamic learning by doing exercises.

All these active methods imply the risk of being rejected because they are new to the participants. Whether the application turns out to be a success or not, depends to a large extent on the educator's attitude towards this new teaching approach. Educators should be convinced of the advantages it offers, and, moreover, they should have had some experience themselves with active learning methods.

5. LECTURES

For many years a straight lecture was the most common education method and a good lecture has uses which should not be ignored. We therefore feel that it is worthwhile looking a bit closer at its pros and cons and on ways to improve its effectiveness.

Unless you are very talented and experienced in public speaking, you will have to prepare your lecture.

As a rule, a lecture/speech/talk consists of a beginning, a middle and an ending. The beginning is meant to establish contact with the listeners and to introduce yourself, your subject and its aims. The middle contains the real facts and arguments the speaker wants to get across, and the ending consists of a summary and conclusions. It could also include an appeal for further action or strategies. The ending of a speech is a very strategic element because what is said last is likely to be remembered best. Lecturers can be presented in different ways:

a) Formal lecture

Good points in a lecture

A formal lecture, that means a plain oral presentation of one or several subjects, has the advantage that it is easy to arrange and that it reaches a large audience. It is ideal for a systematic presentation of facts or other

information that are new to the learners. Moreover, for some people listening is easier than reading.

Lectures leave the audience passive

However, a formal lecture is a one-way communication that leaves the audience passive. There is also a danger that a presentation is too abstract or that too much information is given too quickly. It disregards the learning speed and capacity of the individual, resulting in fatigue and failing attention. As we said before, the different senses are the gateways or channels to the mind. Giving a lecture means using the hearing channel only, and consequently reaching a low level of retention of information. There is, moreover, no way of judging how much of the information given has been absorbed and understood. Advise participants to take notes to improve concentration and learning.

In any case, if you cannot do without a lecture, keep in mind that most people's attention is limited to about 15 minutes. Any talk should be clear, simple and short, making use of audiovisual aids, if possible. It should be followed by a question/discussion period reinforced by a distribution of a handout.

b) Informal lecture

This technique is also known as "active" or "interval" lecture. It means that the oral presentation is interrupted by question and answer periods, exercises, group discussions or oral reports by other participants – all combined with the skillful use of visual aids and other supporting material like background facts, specific examples, illustrations or statistical information. An informal lecture combines the advantage of a lecture with those of the active learning methods. It activates the audience and allows for some feedback.

HOW TO ORGANISE A LECTURE

- Design an introduction that will catch the audience's attention and arouse its interest and curiosity
- State your central idea/s and aims concisely
- Develop the body of the speech by outlining in a logical form the main ideas, giving all supporting arguments, facts and details
- Conclude by emphasizing or summarizing the major points of your speech or by appealing for action
- Write out key headings and subheadings, preferably on postcard-size pieces of cardboard, which will keep you on track when you talk. Remember to number the pages or cards.

To finish this chapter on training methods and techniques, we would like to point out that programme planners should think of frequently changing the techniques they use in order to retain the interests and the attention of the participants. The mixing of techniques is a very effective technique itself!



A formal lecture: the Abdulhay Ahmed Saloojee memorial lecture in 2019, given by French-Brazilian sociologist and philosopher, Michael Löwy (above).



**Abdulhay Ahmed Saloojee Trust
memorial lecture 2019**

**STRUGGLES FOR
DEMOCRACY IN LATIN AMERICA –
Lessons for South Africa's forthcoming elections?**

FRIDAY 5 April 6 – 9 pm

LIVESTREAM

VIDEO [WWMP Labour Show Facebook page](#)

AUDIO radio786.krypton.co.za/
and broadcast live on 100.4 FM

12. EDUCATIONAL MATERIAL

A number of educational materials are in existence, but it is often hard to find something which meets your specific training needs. In fact, the material you create yourself might often be better than any ready-made study material, because it will be linked with your ongoing education programmes and will best fit the particular needs of your course participants.

The production of the materials is dependent on the skills, the equipment and the financial resources available. Whilst equipment and funds must be found, skills can be developed. The guidelines outlined in the box have been designed to provide a step-by-step approach to producing materials.

Once you have completed the last stage of these guidelines make sure the material is clearly laid out before reproducing it using a photo copier or printer. The material you have created in this way is likely to match the needs of those who will be using it.

The cost for reproducing or translating the material you have developed could also be part of an education programme and be included in the budget accordingly.

Educational materials could, of course, also be produced in a team and thus its production becomes an educational activity in itself!

HOW TO PRODUCE YOUR OWN MATERIAL

- Define **what type of material** you are going to develop
- Draw up a **profile of your prospective course participants**: keep in mind that who you are writing for will affect what you write and how you write
- **Decide upon your contents** after establishing the needs of those you are writing for
- **Collect useful information and resource material**. Union constitutions, journals, labour legislation, union policies, newspaper cuttings, on labour topics, and general education material adapted to your local circumstances can serve as useful sources
- **Draw up a list of the major points** to be covered and put them into a logical sequence
- **Write clearly** using plain, concrete and specific words. Keep your sentences short. Long and complicated sentences are difficult to understand
- **Break the text down into small paragraphs** in order to make it easily readable. A text can also be broken down by using headings, dashes, diagrams, drawings, graphics, or pictures which help to attract attention and to ease comprehension
- **Read through your material** and try to improve it. You could also ask other educators to comment on it.
- **Test your material** in an education situation and find out if it is effective and how it can be improved.

TOOLS AND MATERIALS

Tool or material	Advantages	Disadvantages	Cost	Use	Comments
WRITTEN MATERIAL:					
Primers for illiterates and new literates.	More relevant than standard primers. Can serve as an introduction to workers' education.	Few tutors are capable of preparing them and having them published. Workers' education bodies lack the necessary financial resources.	Quite expensive.	Special training needed.	The preparation and publishing of such primers should generally be left to special literacy departments, to which workers' educators can extend appropriate collaboration, ensuring that the material is really functional.
Booklets, magazines, bulletins, etc.	Easier than standard text for new students to read. Topical. May deal with local affairs. Can be graded to suit the level of the students concerned.	Their production takes a lot of time and energy. They imply one-way communication involving use of the sense of sight only.	Quite expensive.	Fairly easy.	The tutor should group involved in reading and in writing articles. In the case of periodicals it should not be attempted to produce issues at too many frequent intervals.
Study manuals.	Once produced, they can be used for a long time. They help "conscious learning".	They may not be at the right level for a given group of students.	Expensive.	Of varying difficulty.	These are essential for all but the most basic types of workers' education.
Duplicated handouts.	Can be adjusted to the requirements of a particular group.	Their production involves hard work.	Cheap.	Easy.	Even a mediocre handout than an expensive textbook that is too advanced.
Modular study skills.	Prepared in step-by-step "units" by experts. They make it possible to use as mass-produced visual aids.	They cannot be completely adapted to the requirements of a particular group, though they enable study to proceed at different speeds.	Expensive.	Easy.	They are hard to produce well. More research is needed for workers' education study kits.
Programmed instruction booklets	They enable individuals to work at their own pace. They include some built-in feedback	They are essentially for dedicated students, who must be literate	Cost depends on how many are produced.	Easy, if they are well produced.	They can be prepared locally on a trial basis for simple topics or they can be produced on a large scale.

Tool or material	Advantages	Disadvantages	Cost	Use	Comments
Books	Durable and useful for reference purposes. Can be graded to suit the level of the students concerned	They imply one-way communication involving use of the sense of sight only. Hence learning by this means is very passive.	Expensive	Easy with guidance.	Workers' education students need guidance on how to read and what to read. Discussion and written exercises are helpful in this respect. Books are seldom used well in workers' education.
Wall newspapers, bulletin boards.	Striking, graphic and topical. Students can help to produce them.	Their production involves hard work, but they soon become out of date and need to be regularly replaced.	Cheap.	Easy, but requires a constant effort.	The whole group should be involved in their production. They are helpful for familiarising illiterates with written material.
AURAL AIDS:					
Radio	Overcomes problems of illiteracy and remoteness. Radios are light and cheap.	No visual element. One-way communication. No feedback. The students are passive	Expensive	Easy	Needs specially prepared programmes. Best if combined with discussion and listening groups under trained leaders.
Recordings	CDs are light and tough. Since immediate playback is possible, they are ideal for discussion analysis	They need a CD player, which can be a fairly expensive item. Only "audible behaviour" can be recorded. There is no visual element.	Expensive	Fairly easy	By this means speeches of national importance can be heard in remote places. Very helpful for tutor-training or for "public speaking" classes.
NON-PROJECTED VISUAL AIDS:					
Black/ Whiteboards, etc.	Very flexible. Have visual appeal. Large surface. Roll-up models exist for use in remote areas	Writing on them needs practice (though this is quickly acquired). What is displayed does not remain available for repeated use	Cheap.	Easy, if trouble is taken at first.	Independent of electricity. There should be one in every group. Tutors should be trained in their use. They are especially valuable for schematic summarizing.
Graphics, (posters, diagrams, graphs, maps, charts, etc.)	They have visual appeal and can be used to emphasise important points. Can be felt on the display board for subsequent study.	May be misleading if over-simplified. Can be awkward to carry and store.	Fairly cheap.	Easy if trouble is taken.	Groups can help in their production. The cheapest method is to use markers on newsprint. Should not be left on display too long ("familiarity breeds contempt").

Tool or material	Advantages	Disadvantages	Cost	Use	Comments
Turnover charts, flipcharts, etc.	They have visual appeal. Suitable for step-by-step instruction. Durable. Avoid overcrowding individual pictures.	May be awkward to carry and store. Once produced, cannot adapted to the requirements of another group.	Cheap if homemade.	Easy.	Like all non-projected aids, independent of electricity.
PROJECTED MOVING VISUAL AIDS:					
Films	They have strong visual appeal (and may have a soundtrack too). Can be appreciated by illiterates. Does not necessarily need the presence of a tutor.	Good films for workers' education are rare. One-way communication unless properly discussed.	Expensive to buy and maintain.	Need technical know-how/support.	Best if combined with a preparatory talk and subsequent discussion. A good film is worth using well and often.
Television	Appeals to the eyes and ears. Can show events actually happening. Can be appreciated by illiterates. Does not necessarily need the presence of a tutor.	Programmes are usually poor (short, distorted presentation of issues, etc.) One-way communication unless the viewers also form a discussion group.	Expensive.	Easy.	Despite its costliness, the apparatus does not guarantee good workers' education. Maybe the medium of the future, but much trade union pressure is needed first on those responsible for making programmes or create our own TV programmes.
Video tape recordings	They appeal to the eyes and ears. Afford the possibility of immediate playback of sounds and actions that have been recorded. They make a very strong impact.	The equipment is still very expensive, people may be "camera shy".	Expensive	Easy	Excellent for analysis of group discussions or meetings, or for teaching practice. Camera shyness usually does not last long.
PROJECTED STILL VISUAL AIDS:					
PowerPoint with digital projector	Very flexible. The material to be displayed can be prepared in advance, amended, erased, etc. "Overlays" are possible. The speaker faces the audience. Functions in daylight.	Can be tiring on the eyes. Expensive to buy and use. Can be boring.	Digital projectors are expensive and need technical support.	Requires operating knowledge	All projected visual aids increase the size of the small image, so they can be used for making large maps, etc. A summary of a talk can be displayed progressively.

13. THE STRUCTURE OF A SESSION

Following a pattern which is widely used in education, a session should consist of an introduction, an activity, a reinforcement of the activity and a summary. To give an example, the first session of an educational activity could be structured as follows:

THE STRUCTURE OF A SESSION	
INTRODUCTION	<ul style="list-style-type: none"> • Welcome • Presentation of objectives, contents and methods and a discussion of these points • Getting to know each other
ACTIVITY	<ul style="list-style-type: none"> • Presentation of the subject • Explaining the task • Analysing, discussing, finding solutions
REINFORCEMENT	<ul style="list-style-type: none"> • Review of the activity • Presenting the issue from a different angle • Practical exercise/transfer into action of what was learned
SUMMARY	<ul style="list-style-type: none"> • Summarising the achievements • Evaluation of the activity • Lead-in to next session

INTRODUCTION

The importance of the opening phase cannot be stressed enough. This is the moment when the smooth running of the whole activity has to be established.

After a warm and friendly welcome to the participants, information should be given on what the course/seminar is supposed to achieve and the topics to be covered.

An outline should be given on how the different topics will be handled and what methods will be used.

You should give the participants the opportunity to discuss the elements and, if there are valid reasons for it, have them adapted to their needs. This is an occasion for practicing democracy!

Describe your role as a non-authoritarian educator and tell the participants that, while you have ideas to present, their ideas are also of importance and interest.

At this point it is extremely important to make the participants understand why we use the active learning approach and how it works. To many of them this might be a new approach.

Getting to know each other

As was mentioned before, the beginning of the course sets the tone for the entire activity, and for this reason you should plan it very carefully. You should try to create an easy-going, information atmosphere from the very beginning which encourages participants to participate actively in the learning process.

So-called “ice-breakers” are a way of getting people to know each other, relax and feel a part of the group. Icebreakers also help create a non-threatening environment where participants are free to express thoughts, ideas and feelings.

One example of an ice-breaker is an interview between pairs of participants. Questions might touch on the following:

- Name
- Union
- Trade union or community organising experience
- Activities in the union/community
- Expectations of the course?
- Anything else they feel may be of interest to the rest of group

The Activity Sheet on page 44 gives an idea of how an icebreaker could be introduced.

There are many different kinds of introductory techniques. It is up to imagination of the educators to create icebreakers that suit the occasion and fulfil the goal. (A recent course report mentions getting off to a good start through the singing of inspirational struggle songs!)

It is also worthwhile mentioning that the use of icebreakers is not limited to the opening of a programme. They can have a valuable function in getting an afternoon or evening session off to a good start.

The only cautions that should be observed are:

- Do not use icebreakers in which participants could feel threatened or embarrassed. Remember, the object is to establish a climate of trust.
- Do not let the icebreaker drag on too long. Once the point is made, move directly into the main part of the session.

EXAMPLE OF AN ICEBREAKER

ACTIVITY SHEET	
<i>Icebreaker</i>	
AIMS:	<ul style="list-style-type: none"> – to find out who is who on the course and to get to know each other better – to create a friendly learning atmosphere – to practice interview skills
TASKS:	<ul style="list-style-type: none"> – To help introduce everyone, we will ask you to break into pairs, preferably with someone you do not already know. – You will be asked to introduce your partner to the rest of the course. To do this you will have approximately ten minutes to interview each other (it is advisable to make brief notes) and then 2 – 3 minutes to introduce the other member to the whole group.

ACTIVITY

Whatever means and techniques you use to introduce a new subject or content, try to illustrate the information you want to give by putting it into a context that is already familiar to the participants. **Use concrete examples** so that the participants readily understand what you are talking about.

If you break up into groups for the first activity, **explain the task well** and begin with an easy one in order to get the participants used to the working method. This creates the self-confidence needed to tackle more difficult topics that will follow.

The subject concerned is to be analysed and discussed. Solutions might have to be found.

REINFORCEMENT

One way of reinforcing what has been learned is to review the major points of an activity or session. Have the contents reconsidered from different points of view or by using a different method.

Get the participants to consider a strategy for converting the lessons learned into some action or practice.

Remember, people learn by doing – not by simply talking about things.

SUMMARY

Try to end each major part of a session on a positive note by summarizing what has been achieved. If it is the last session of the day, the general pattern is to close with an evaluation of the activities (see Chapter 15) and with an outlook on the activities planned for the next day.

A teaching session rarely stands alone. Any succeeding session should follow the same structure as described above. As a rule, the introduction phase should then start with reference to what has already been covered and the summary should close with an outlook on the next session.

TIMING

It is difficult to tell in general terms how to time a session, because there are too many variables in this situation. However, you should have a clear idea on how much time you want to spend on the different steps and try to stick to your schedule. Do not forget to provide for sufficient breaks and pauses and for some time for yourself to reflect. If necessary, re-plan the sessions.

You may find the enclosed form “*STRUCTURE OF THE SESSION*” useful for the planning of a session.

STRUCTURE OF A SESSION

OBJECTIVE

	CONTENT	METHOD	MATERIAL	TIME
INTRODUCTION				
ACTIVITY				
REINFORCEMENT				
SUMMARY				

13. PREPARING A COURSE/SEMINAR

SENDING OUT INVITATIONS

As soon as you have designed the course and decided who is going to participate in it, send out an invitation letter or ask the organizing union to do so.

An invitation letter should be sent as early as possible because in many places it can be a lengthy process to get people released from work. Moreover, participants have many things to arrange at home and at work before they can leave for the course, especially if it is residential or lasts for several days. In South Africa, the Labour Relations Act (LRA) makes provision for paid leave for shop stewards' education.

It may, in fact, even be better to send out a first letter providing only basic information like place, date and title or contents of the activity. This allows the participants to arrange leave with the employer in time. A second letter would then contain more specific details about the event.

Sometimes you might also want to send a questionnaire together with the invitation to be filled out by the participants in order to receive the information on their organisational or union experiences and on their expectations.

OPENING OR CLOSING CEREMONIES

In preparing your course you will have to give a thought to the opening or closing of the activity.

In trade union courses, opening ceremonies with guest speakers and an official programme are still fairly frequent. However, they tend to serve the general interest of the union more than that of the particular course and its participants.

As an alternative to an official opening ceremony it might be worthwhile considering a more formal closing of the course/seminar. Having acquired or deepened their knowledge of certain trade union matters, participants might benefit more from such a ceremony at the time. They could have useful contacts with union leaders and other invited guests.

If you prefer an opening ceremony because, for example, this is more in keeping with the traditions of the country, it is advisable to mark the end of the official ceremony by stopping for a coffee or tea break and then start with an introduction to the actual course for the participants.

In any case, opening or closing ceremonies should, if at all possible, not be too long or elaborate. Especially in sponsored education activities, they should be planned in proportion to the length and nature of the course/seminar and to the number of participants involved.

ORGANISATION AND LOGISTICS

At this stage the venue has probably been chosen, the overall contents of the activity are defined and all other requirements of the planning phase have been met, but there are still many things that have to be prepared. The following list should act as a reminder:

- **Check whether all bookings have been made** regarding accommodation, seminar rooms, transport, food and social events. This might be the moment to ask for reconfirmation.
- **What means of transport are needed?** Is it necessary to make any bookings in advance?
- **Prepare background material, working papers or any other documents** you or the participants will need. Send them to the participants as early as possible. Think of any translations that might have to be made.
- **Is a resource person involved in your seminar?** Send him/her a programme and a briefing to ensure that the issues to be covered are presented in a way that fits into the programme and is suitable for the target group.
- **Make sure that administrative and secretarial help is available** if you need photocopying, typing or other services.

- **Stationery** – if not locally available, order well in advance: certificates, paper, pens, markers, flipcharts, adhesive tape, scissors, pins and all other material you and the participants will need for the activities.
- **Prepare name cards** for the participants before the course starts.
- **Will a banner be required?** Arrange for its production by clearly indicating wording, layout and size.
- If you are using an education centre or a similar institution, it is also a good idea to **arrange for someone from the centre to talk to the course participants** about housekeeping and the available facilities.
- **Will you have to hire audio-visual equipment?** Make sure that the equipment ordered is suitable for the purpose, that plugs fit and that extension leads and spare bulbs are provided.
- **The seminar room** might need some decoration in which case you should arrange for some posters and/or flowers.
- **If you are using a camera**, see that batteries are available. If you want a photographer, do not forget to make an appointment.
- **Well-prepared administration** facilitates the smooth running of an educational activity. It is therefore advisable to:
 - Think of how you can handle registration.
 - Prepare participants list that has to be signed.
 - Calculate any payment that has to be made to participants and open a file where you keep all receipts for payments made.

GOOD LUCK!

CHECKLIST

When you arrive at the course site – well ahead of the participants – you should check that everything is in order. This checklist will help you to remember what needs to be done:

1. **Contact the managers/directors of the course facility** and check once more that all arrangements have been made as agreed when you reserved space for your group (meeting rooms, accommodation, provision of meals, tea, coffee and refreshments, teaching equipment, etc.)
2. **Make a room list with the manager** which helps the participants to find their rooms easily when they arrive. If participants are accommodated in double rooms or larger, consider allotting rooms upon their arrival, in order to give them the chance to choose their own roommates.
3. **Make sure that social facilities** have been prepared and properly arranged.
4. **If not already done, write a welcome letter with practical details** concerning the course site (restaurant or canteen opening hours, house rules and customs, transport facilities, medical facilities, leisure-time possibilities) to be handed over to the participants at the opening of the course. This letter could also contain information on latest changes in the programme etc. and be accompanied by a participants' list.
5. **Prepare the meeting room(s)** so that they are appropriate for your course. Make sure the seating arrangements are suitable for the activities foreseen and that all teaching facilities and equipment are in good running order (projectors, screens, blackboards, flip-charts, plugs, sockets, etc.)
6. **Check that paper, pens and document folders** as well as name tags or folded cards to be put in front of each participant are available
7. **Make sure that your course material is complete** and on the spot.
8. **Take a deep breath and relax!**

14. EVALUATION

Evaluation is quite a complicated issue in trade union education because of the difficulty involved in trying to measure the impact of educational activities. Trade union education cannot easily be evaluated in terms of numbers or percentages. For example, it is difficult to establish whether an increase of 10% in union membership is purely a result of a successful education programme or of other factors. Or, to give another example: Let us assume you want to evaluate a “Training the trainers” programme. Will you then judge the effectiveness of your programme only by the number of those trained who are actually teaching now, or will you judge it by how good a teaching job they are doing – or both?

Why is evaluation necessary?

As a rule, the organisation conducting an activity is interested in knowing whether what they have paid for was worthwhile.

In addition, the educator would like to find out whether s/he was able to achieve the aims which had been defined for an activity. Finally, the participants themselves will want to express their views on the activity they participated in. Evaluation, therefore, is a necessity.

Evaluation of any kind can only be successful if it has an established baseline against which change can be measured. It also requires the aims to be clearly defined in advance. The more specific they are, the easier it is to judge the results.

There are different types of evaluation, ranging from the daily monitoring of sessions or courses to a detailed study of the impact of a course or education programme, which might take place sometime afterwards.

Theory is one thing – practice is another. How can we make an evaluation?

Evaluation can give answers to questions like:

- Have the original needs been met?
- Have the learning objectives been achieved?
- Have the desired changes in skill, knowledge or attitude occurred?
- Are the participants able to use what they have learned in their daily work?
- How could the programme be improved?
- Could the educator improve his or her performance?
- Were there any unintended outcomes?
- Which follow-up programmes should be planned and developed?

A) EVALUATION OF A SESSION/COURSE/ SEMINAR

It is good practice to provide sufficient time for the evaluation of a particular education activity in order to offer **the opportunity to reflect on its strengths and weaknesses and to suggest improvements for the future.**

In addition to the evaluation at the end of a seminar or course, both the educator and the participants need to know how they are progressing during the course. Some thought should therefore be given to short evaluations during other phases of the programme, for example at the end of a study session or at the end of a day. The participants’ feed-back, that is their reaction and opinion on what has happened so far, is helpful to assess the effectiveness of the course while it is still going on, and to determine what improvements or modifications should be made in order to meet the participants’ expectations and needs.

B) EVALUATION OF AN EDUCATION PROGRAMME

The detailed evaluation of an education programme usually takes place after a certain number of activities in a long-term programme have been completed or when a programme has finished.

The timing, method and number of persons involved in an evaluation is largely dependent upon the structure of each education programme. Once the terms of reference have been drawn-up, an evaluation would normally consist of:

- a) a study of background materials related to the programme which would enable the evaluator(s) to establish the aims and objectives, read through reports and collect statistical information;
- b) interviews with the key persons involved with the implementation of the programme to record their experience and comments;
- c) interviews with participants to discover to what extent they have been able to put the skills and knowledge they have acquired during the programme into practice, and to receive their comments.

There should also be scope for collecting responses from organisers and participants at an evaluation seminar.

An evaluation is best undertaken by a person who has not been directly involved in the programme, however, s/he should carry out the task in co-operation with the programme organisers in order that they can learn from the findings.

The evaluation should record the experience of the education programme and draw lessons which would be of assistance in the planning and implementation of future educational activities.

It is important to make sure that the union and other interested organisations have the machinery for dealing with recommendations made by the evaluation.

C) EVALUATING THE EDUCATOR

Having been concerned so far with the evaluation of sessions, seminars or whole education programmes, we should not forget to also give some thoughts to the educator's performance.

There may be clear signs that something is wrong, for example participants arriving more and more late for sessions, not paying attention or not participating, having side talks, etc. But very often it is less obvious whether things are going well or if they could be done in a better way. Therefore, you should review the activity and the role any educators involved played in it.

At the end of the day ask yourselves questions such as:

- Did we achieve the aims of today's sessions?
- Did we make proper use of prepared notes, the equipment and material available?
- Were the methods applied suitable to make the participants understand the subjects?
- Did the participants learn the skills they were supposed to learn?
- How did we react to the participant's questions or comments?
- Did we get and maintain the interest of the group?
- What was the overall atmosphere?

Asking yourselves these and other questions will tell you where you can improve your approach while the course is still going on.

The following pages contain examples of various evaluation methods.

All evaluation is of value only if the answers obtained are properly analysed and if, as a consequence, lessons are learned and improvements made in order to make our work, our courses and our education programmes in general more effective!

EXAMPLES OF EVALUATION METHODS

1. POSITIVE/NEGATIVE ASSESSMENT

Procedure:

Hand out 2 cards or sheets of paper, one with the beginning of a positive statement, the other with a negative one, for example:

a) positive

"In this session/course/seminar I have learnt that ..."; or

"The most interesting part/issue of this session/course/seminar was..."

b) negative

"I was very disappointed that..."; or

"I did not like..."

The sentences then have to be completed by the participants. Thereafter the cards can be read out by participants after having shuffled them or they are pinned under positive (+) and a negative (-) heading to the wall, being then the subject of a general closing discussion. Out of this discussion, recommendations and suggestions for the planning of future workshops could be made.

2. FLASHLIGHT

This method is of particular use while the course is still going on.

Procedure:

Without any preparation and without hard thinking, participants are asked to comment spontaneously and in turn on a given question about topics such as the contents of the session, the teaching method or the atmosphere of the group. Questions should be as short and simple as possible, enabling every participant to have an opinion on it.

Flashlight questions:

- What do you think about the venue facilities?
- Is the subject we dealt with relevant to your work/interest?
- What were the strong or weak points in the teaching method used?
- What did you get out of the course (so far)?
- What suggestions do you have for improvement or change?
- What additional comments do you wish to make?

3. GRADING ACTIVITIES

Sessions, lectures or other parts of a course/seminar are graded by giving points or quality marks.

Procedure:

a) Individual assessment

Prepare an evaluation sheet with questions or general points that cover certain parts of your programme and hand them out at the end of a day or at the end of the activity (see example form below). The result serves the educator as an indication of the success or failure of the different parts of the activity.

b) Group assessment

Enlarge the described evaluation form to approximately poster size and pin it to a wall or flipchart. Have the participants mark their assessment by a cross in the chosen field. The results can then be discussed in detail.

	1	2	3	4	5	6
Subject matter						
Methods used						
Timing						
Atmosphere						
	Excellent	Good	Quite good	Not bad	Rather poor	Poor

4. BRAINSTORMING

Brainstorming is an evaluation technique that promotes a free flow of ideas.

Procedure:

Everyone is encouraged to express spontaneously what is on his/her mind concerning the activity or the learning situation, but this time without any pre-given structure.

Experience shows that in order to get this activity started, the person conducting the group should encourage someone courageous to begin.

Before starting this exercise, it should be pointed out that no critical comments should be made immediately on the thoughts and feelings expressed by members of the group, because it would prohibit the free flow of ideas. Matters that need a follow-up can be discussed after everyone has made a contribution.

5. EVALUATION WORKSHOPS

Procedure:

In an evaluation workshop, participants come together at the end of a course/seminar to discuss the course and its relevance to their needs and their work. Usually the educator does not participate in this workshop in order to allow a free and open assessment and the participants will have to determine a discussion leader and a secretary to write a summarised report. Points to be evaluated should be prepared in advance by the educator.

6. QUESTIONNAIRES

Procedure:

a) Group Evaluation

Prepared questionnaires are handed out to the participants. They are discussed in small groups and the result is then reported back to the whole group, preferably by using flip-chart or posters. This activity can be an end in itself or be the basis for a discussion (see enclosed Activity Sheet)

b) Individual Evaluations

As above, but prepared questionnaires are filled in by the individual participant without attaching their name. The questionnaires are then collected and handed over to the educator (sample form attached).

EXAMPLE FOR GROUP EVALUATION

ACTIVITY SHEET	
EVALUATION	
AIMS	<ul style="list-style-type: none"> To find out to what extent the aims of the seminar have been achieved To be able to find out how the effectiveness of this seminar could have been increased
TASKS	<ul style="list-style-type: none"> Choose a chairperson and someone who will report back to plenary Structure the workshop in accordance with the time indicated Discuss the following questions and summarise your group's view on a flip chart: <ol style="list-style-type: none"> 1) Taking the seminar as a whole, did the subject matter of the different sessions meet your needs and interests? 2) Which sessions or which parts of the seminar were most valuable to you and why? 3) Which sessions or which parts of the seminar were of less or no interest to you and why? 4) What suggestions would you want to make for future PSI seminars? 5) Is there any other comment you would like to make?
TIME	1 hour 30 minutes

EXAMPLE FOR INDIVIDUAL EVALUATION

ACTIVITY SHEET
EVALUATION
<ol style="list-style-type: none"> 1. What is your opinion of the seminar facilities? 2. Did the contents of the sessions meet our needs and interests? 3. What sessions were most beneficial to you and why? 4. What should be avoided in future seminars? 5. In what way will you be able to help your union with the knowledge and skills you have gained in this seminar? 6. Do you have any suggestions or additional comments?