Formal and informal union education in the promotion of union democracy and activism

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

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

Our data come from four quantitative sources in Australia plus a qualitative source, including:
- the Australian Workplace Industrial Relations Survey, undertaken in 1995, involving surveys at 2000 workplaces with 20 or more employees - we draw upon the 1138 workplaces where the largest union also had a delegate;
- a survey of 852 workplace delegates from the Finance Sector Union (FSU), conducted in 2000;
- a follow-up survey, also of FSU members, undertaken in 2001, in which 102 delegates answered questions after completing delegate training;
- a survey of 379 organisers from 13 unions undertaken in 2003;
- a survey of 2350 current workplace delegates from 8 unions in 2003 and 2004;
- interviews with 60 workplace delegates (the 'focus groups') undertaken in 2004.

Amongst our findings are that:
- education is more important than tenure as delegates in explaining activism;
- building confidence is critical to activism, and higher skill improves activism principally because of its effect on confidence;
- successful recruitment behaviour depends on developing confidence and skills across a range of delegate competencies, not just in relation to recruitment skills;
- the usefulness of training (for those who had undertaken some) was an important aspect of the impact of training on confidence, with less useful training reducing the impact of additional training – a poor rating on the usefulness of training more than offset the positive aspects of training on confidence;
- delegate activism will be influenced by both the breadth of training (the quantity) and the specific type of training. However, because the organising approach is based on
developing particular skills at the workplace, some forms of training (related to mobilising activism amongst members) will be more important than others;

- training in campaigning and developing networks have more influence on membership growth and union success rates than does training in recruitment;
- training boosts delegates’ confidence, which in turn boosts their activism;
- analysis of the types of training and background characteristics of activists indicates that the link between training and activism is unlikely to be due to reverse causality;
- post-training contact with organisers is strongly related to commitment and hence activism;
- formal training is important, but unions should not overlook what happens when organisers train delegates ‘on the job’.

- there are positive correlations between almost all indicators of training and measures of union democracy. On the one hand, training increases the ability of delegates to participate in the activities and decisions of the union. On the other hand, democratic unions are more likely to respond to the needs of delegates and members by making training available. Training and empowerment of delegates and activists creates new power sources within unions. This is not always a comfortable position for those who hold power under existing structures.

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