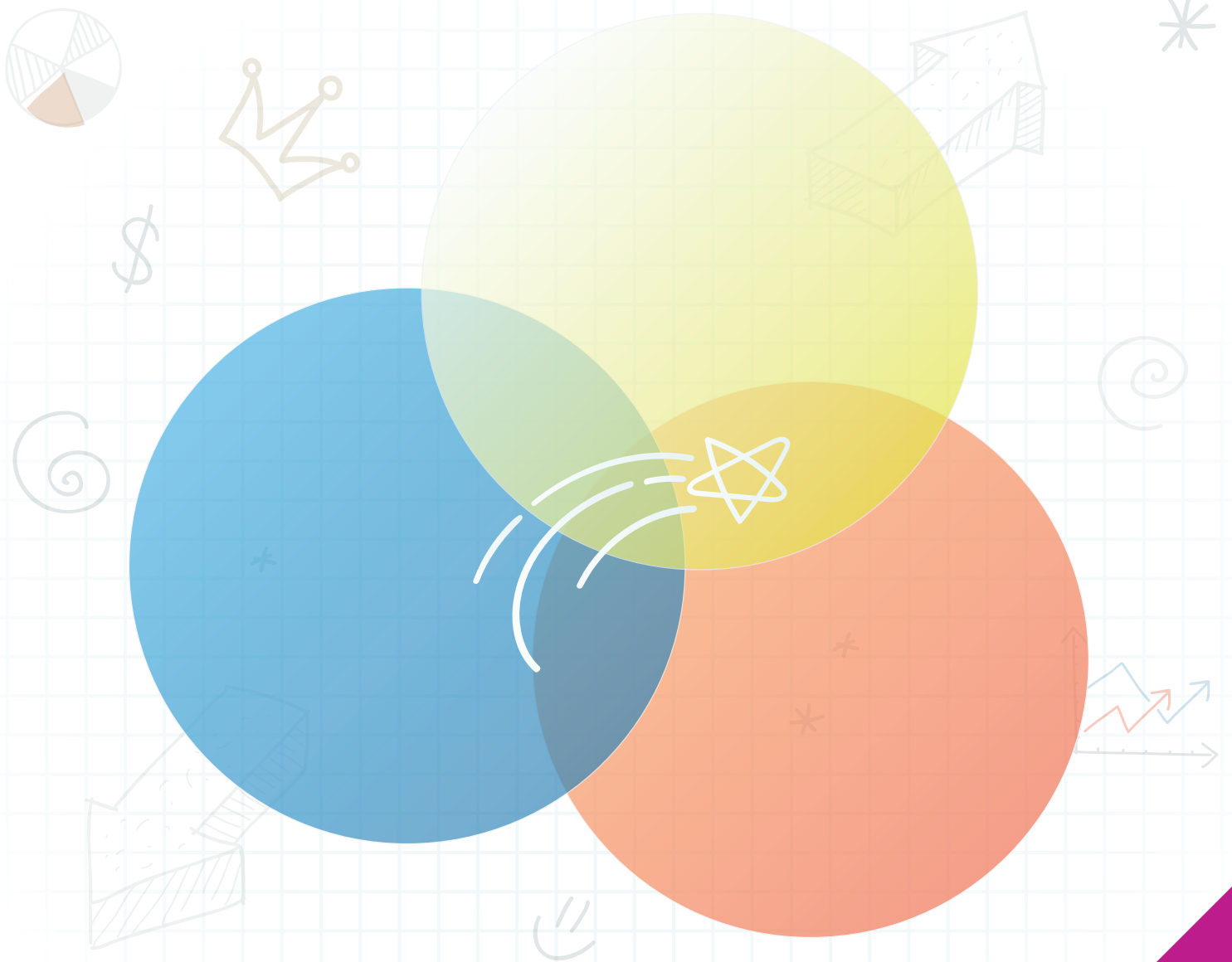


USE IT OR LOSE IT:

EDUCATION AND DEVELOPMENT OF DELEGATES
IN AUSTRALIAN UNIONS



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Executive Summary

The aim of this report is to examine the state of union delegate education and development across a selection of Australian unions. Our project involved interviews with educators, organisers, and union secretaries and assistant secretaries. The interviews were undertaken during the second half of 2022 and early 2023. The research process prioritised anonymity and the collection of honest data, and so in this report individual unions and participants are not named, and references to respondents' own unions are anonymous. In total, 28 interviews were conducted for this report, and respondents came from nine unions. On average, we would expect that the unions whose staff we spoke to were more advanced in union education and development than unions as a whole, since they were more willing to participate in the project.

At a formal level, union education takes place in the classroom (see figure 2 in the main body of the report). But the delegate also learns through the organiser, and through interactions with other delegates via their delegate networks. Moreover, there is critical learning through workplace follow-up of classroom training, informal delegate networking in otherwise structured classes, and formal delegate networks created by the organiser. The benefits of all those things come together when the delegate applies, on the job, the skills and knowledge they have obtained through all the other interactions.

Aims and participation

We sought to understand what the aims of the various programs were. Many interviewees focused on the importance of skills and confidence development as a key aim of delegate training. In building confidence in their delegates, unions were also focussed on the bigger picture of building activism and building power in the workplace. The importance of identifying and developing leaders was also raised, and some expressed it as having the explicit aim of developing distributed leadership within their unions. While there is substantial empirical evidence supporting the idea that distributed leadership, or 'democracy' within a union, is possibly the most important factor in explaining union success in the workplace, there was limited evidence that the idea of creating distributed leadership was important for union leaderships.

We investigated the way in which participants were chosen for training. Targets for numbers of delegates to be trained over the course of a year were common and most reported a drop-off in the numbers trained during the COVID-19 lockdown period. For some unions there was an intentional focus on ensuring that the delegates receiving training were reasonably representative of the union's overall membership. Unions acknowledged that the processes for getting delegates to training were often not as inclusive as they would like.

Training typically provided tiers of development that built on each offering. The bespoke programs tended to be focussed on heavy bargaining periods or campaigning activities. Role clarity for delegates was an issue that arose in some of the unions – that is, what exactly is expected of a union delegate and therefore how are they trained and prepared for the role. The identification of leaders in the workplace was a constant work in progress and this was not always straightforward.

Historically, most formal union training has been delivered in physical classrooms, face-to-face. However, a major shift occurred towards online delivery, forced upon unions by the COVID-19 pandemic. There was variable take-up of programs, depending on members' working conditions and capacity to work from home. Innovation was forced upon unions and some unexpected positives arose, particularly with the ability to reach and connect delegates in rural and remote locations. Some of that innovation is likely to be permanent. Improvement in attendance at regional meetings was identified as a bonus from the online move, as was better training for regional delegates. The shift during COVID-19 benefited communications, training delivery and campaigns.

A separate, and recent development in delegate development has been experiential, through much less common, member organiser programs.

Union logistics

Unions typically structured their delegate training programs with a break between the first two days after which delegates returned to work armed with a development plan and some agreed activities that they had worked on during training. When these development plans were worked on either in conjunction with their organiser or communicated directly to the organiser, the outcomes were generally observed to be more positive.

One of the major achievements in some unions was the establishment of nationally consistent programs for delegates, but this was not typical and many interviewees reported that a lack of consistency across their union was a shortcoming. The process of content development was also quite varied.

The Organising Works program continued to have a strong imprint, though the shift to an organising model approach seemed, for most unions, still a work in progress.

Coordination within unions was mixed, a function perhaps of union amalgamations and autonomous branch structures. In some unions, internal coordination had seemingly declined over the years as workloads had intensified. Informal networks of educators within unions were seen to be beneficial. Across the wider movement, coordination and cooperation with other unions was uncommon, with many commenting that they were looking for leadership in this area, particularly around sharing good ideas and best practise. Where collaborations happened, it was more likely to be around campaigning on particular issues. At the level of the programs themselves, there was a bit, but not a lot, of sharing of training materials or of best practise, despite the existence of some cross-union networks of educators and the like. We found no examples of cooperation or working with other not-for-profits or similar organisations on education and development.

A common theme was constraints – temporal and financial – on the ability of unions to deliver adequate training. But there were different perceptions as to the extent this was due to weaknesses in awards and agreements, resource constraints or simply competing priorities. To enable delegates to access training, in the absence of training leave unions utilised a range of options from offering online training programs that could be accessed out of hours, to delegates using their annual leave to attend training, paying delegates for their attendance, or reimbursing employers for replacement workers. The growth in online training had alleviated some of the problems.

Resourcing, in terms of both staffing and money, was a frequent theme. Some focused on the way unions prioritised the resources they had. Recruitment was a common proxy for measuring effects of training and development. Reporting systems, where they did exist within the unions that were part of the study, were generally rudimentary or under development. The overall effects and achievements were observed anecdotally rather than through systematic reporting and access to hard data. The development of more formalised systems for membership reporting and delegate tracking was an aspiration commonly expressed.

Educators sometimes measured success by reference to return rates for delegates to the next stage of training. Other more important metrics were acknowledged as being relevant and critical, but were much harder to collect. Formal evaluation of training was rarely mentioned. Usually the closest discussion came to this was post-classroom evaluation, which was common amongst unions, though surveying delegates (in various ways) was mentioned by some as one of the means by which they assessed success or otherwise.

Ceding leadership was perhaps the sleeper issue amongst the unions we looked at.

The trainer/educator role appeared to be evolving, moving away from the traditional specialist educator to a more blended role of organiser-educator. There were concerns about silos and lack of connection between the various functions within the union office and between different branches and states.

It was typical for training staff to also run programs for union organisers. The question of whether organisers are fixers or educators encapsulated many of the challenges facing unions in the way they structure the relationship between organisers, delegates and workplace issues.

Follow-up and networks

Arguably the most important aspect of union education and training is follow-up to formal training. It can be thought of as part of a broader set of activities that can be grouped together under 'informal training'. The unions that we studied varied in the emphasis they put on follow-up, with differences between what unions wanted to do, and what actually happened. Some organisers did not see follow-up as central to delegate development. Yet research shows how integral it is to the success of education and hence of delegate development.

Administering follow-up

The issue of who does the follow-up is a vexed one in some unions. For most of those investigated, it was considered to be the organiser who should be principally— but not necessarily, exclusively — responsible. Organisers were seen as critical in converting theoretical classroom knowledge, even with simulated situations, into actual situations. Sometimes a connection was ensured by having the organiser attend the training course, but that did not always work. Some used co-teaching by educators and organisers, or at least co-design of courses. Several unions organised things so that follow-up in different forms was undertaken by different people — by both educators and organisers. Some found a way to integrate face-to-face and then online methods in follow-up.

Networks

Effective networks are a combination of strong and weak ties, so delegates sometimes do not recognise they are part of a network. Networks are pertinent, not just because of their role in developing union power and retaining delegates, but also because the interactions that networks enable are a crucial part of learning, and therefore potentially relevant to follow-up. Lessons from the classroom may be reinforced by delegates' subsequent engagement in networks — or weakened by the lack of such engagement.

Occasionally a union would consciously set up delegate networks. They may take union resources to develop, but in the long run they should free up union resources and give unions access to more power resources. The limited use of social media by Australian unions contrasts with that in some other places.

Conclusions

Union education and development is critical for union survival and growth. Major advances have been made in union delegate education and development, given the array of challenges facing the union movement. However, there were still significant areas of education and development in which improvements could be made. Choosing delegates for participation in training and education could often be more systematic. Better information systems are needed to systematically track delegate education and development, particularly for evaluating its effects. Unions should avoid looking for the things that were most easily measurable to envision the effects of training. They need to move beyond recruitment and membership growth: even membership growth is not really a proxy for activism. To measure this directly, unions need to make greater use of pre- and post-education surveys that enable before-and-after comparisons to be undertaken, to measure the impact on activism and success, the ultimate aims of these programs.

It seems likely that there would be synergies from unions working co-operatively on education and development with other parts of civil society. However, this report was not the place to go into that in more detail.

The biggest, mostly *invisible*, issue was the relationship between union education and development, on the one hand, and the distribution of power within unions, on the other hand. Effective delegate education and development changes delegates' expectations of the union organisation, from an entity that *fixes* problems to one that *supports* delegates as they go about resolving those problems with their workmates. The union becomes less of a third party service provider, and more of something of which the delegate is actually a part, and in which they demand to have a say. If they don't get that say, they can become disillusioned and disengaged.

The biggest, mostly *visible*, issue, on the other hand, was the critical matter of follow-up. There was not adequate attention being paid to follow-up of training as it is not really effective for educators to be the principal actors in follow-up. Yet the demands on organisers' time were already excessive. They often (saw follow-up as an additional impost on their time. In reality, follow-up is *central* to delegate development, and hence to the emergence of workplace leaders. If it is not done, the effort put into training is wasted, and unions could have better used those resources elsewhere.

When organisers see follow-up as integral, not additional, to delegate development, then they are in a position to look at their use of time in a different way. This is not to say that only organisers should be responsible for follow-up. In the end, however the organiser is key to successful follow-up that is most directly relevant to that delegate's workplace situation. A fully effective delegate education and development program requires active involvement of organisers and hence a clear understanding of their role, the expectations of the role, as well as high-level skills to implement that role.

The real issue is the determination of priorities. Failure to prioritise follow-up would mean that follow-up does not happen. This is a conscious choice of union managers.

Existing research shows how essential follow-up by organisers is to prudent use of limited training budgets. When it comes to the lessons from training and education, delegates need to 'use it or lose it'. For a union, it is more effective to allocate sufficient resources to enable all training to incorporate follow-up, than to send lots of delegates through training without any plan for follow-up afterwards. In the end, there are three things a union should look for from the training process:

- ensuring the training is relevant, *where appropriate*, to what delegates will be doing in the workplace;
- ensuring that organisers make contact with delegates, especially after classroom sessions, and that they do so purposefully, helping delegates learn, on the job and informally, how to apply the lessons from the classroom, and;
- ensuring that delegates also have contact with other delegates, again to reinforce the lessons from the classroom (and also, what they have learned from the organiser).

When we think of the three aspects of the learning process that one of our organisers referred to – the classroom, on-the-job experience, and interactions – the interactions are so often forgotten about. Some unions consciously (or incidentally) facilitate networking through delegate conferences or other scheduled events. More, it seems, need to be done to develop formal, organised networks of delegates, especially networks extending beyond the workplace, and in some cases beyond their industry. The establishment and nurturing of these networks is something that organisers are critical for, and therefore is something that also needs to be built into the work and education of organisers. Good networks are crucial.

There is no single solution to the problems facing unions in delegate development and education policy, what works for one union may end up quite differently for another, and so continuous improvement is an important aspect of creating effective delegate development programs.

Introduction and Learning Concepts

1 Background and methodology

The aim of this report is to examine the state of union delegate education and development amongst a selection of Australian unions. In doing this we also explore the aspects of union education and development that are open to improvement. The report derives from interview with officials and staff in a variety of leadership roles, and education, training and organising roles, in a number of Australian unions, and builds on two decades of research into delegate education and development. The term 'education and development' encompasses what is often called 'training'. The term 'delegates' includes what some unions call 'workplace reps' or 'representatives'. The study was funded by the Australian Council of Trade Unions (ACTU) but the responses of the participating unions have been kept anonymous.

It was originally envisaged that this project – the 'Australian Union Delegates Project' – would principally be based on a large survey (in effect, a census) of Australian unions through which quantitative data would be collected. The survey was to cover such issues as union policy, membership numbers and characteristics, delegate numbers and characteristics, delegate education and training (for example, courses offered, their duration, skill content, mode of delivery, numbers and identification of participants, follow-up and the major challenges in training) and the link to organisers. Such a survey was designed and administered during late 2020 and early to mid 2021.

However, the COVID pandemic seriously affected participation, and despite repeated reminders to participants, the response rate to the survey was too low to make it appropriate to prepare and present a thoroughly quantitative result. Although a report on such a survey would have met the original contract brief, the numbers were simply too low to give a representative assessment of the state of delegate development and training across the union movement. It was decided that the remaining funds would be better spent through a redirection of the project. Instead of proceeding to do a thorough quantitative analysis, it was decided to transform this into a qualitative project, focusing on a small number of unions or union branches, and the achievements and barriers that those unions faced in the task of delegate development and training.

This involved interviews with key officials involved in delegate development and training within those unions or branches. The interviews were undertaken online (via Teams or Zoom) during the second half of 2022 and early 2023. Participants were selected in one of two ways. For ‘white collar’ unions, (representing mainly non-manual occupations) a subsample of participant unions (technically, some were union state branches, but we call these ‘unions’ in this report as they were mostly autonomous on the issues discussed here) were selected from those who had completed the quantitative survey, enabling some baseline data to be drawn upon. These unions were also expected to be the ones most likely to cooperate. For ‘blue collar’ unions (representing mainly manual occupations), it was agreed that initial invitations to participate would be made by the ACTU to selected blue collar unions. Once two unions had agreed, their details and contact details (including the names of the initial contact point) were passed on to the research team. It was agreed by the ACTU and the researchers that this was the most likely way to get blue collar unions (who had a much lower response rate in the quantitative survey) to agree to participate.

The questions to be investigated in the interviews included queries on: the major achievements of the union in delegate development and training; the major practical challenges facing the union in identifying suitable participants and ensuring they participate, ensuring content is appropriate for achieving the union’s objectives, achieving suitable co-ordination (within the union, or with outside bodies), enabling appropriate resources to be devoted to delegate development and training, ensuring appropriate follow-up of participants occurs, and using training to develop activists and promote union success and growth; and the support that was needed to overcome difficulties that were identified. We have not included any assessment of delegate training and development as provided by the peak bodies.¹ In a small number of cases, a union trained selected activists, not just delegates, but for the purposes of this project we treat the two as synonymous in that we just use the term ‘delegates’ when referring to members being trained. Interviews were roughly an hour long. Before, or at the beginning of, the interview, participants were sent (mostly via email) a participant information sheet and asked to indicate consent to be interviewed, either by signing the form, sending a reply email agreeing to be interviewed, or agreeing in a recording at the beginning of the interview that they have seen the participant information sheet and consent to be interviewed. Approaches to potential participant unions were made through 2022 and fieldwork occurred in late 2022 and early 2023.

¹ There would be a conflict of interest in doing so, as the funding for this project was provided by the Australian Council of Trade Unions.

To ensure anonymity and honest data, the identities of white-collar unions participating were not passed on to ACTU. No further details that would enable identification of any respondents or their union have been passed on to the ACTU. Likewise, in this report individual unions and participants are not named, and references to respondents' own unions are anonymous.

So, in the end this study had a very different methodology to that with which it started. But in writing this report, it occurs to us that this is not such a bad thing, and indeed could be a blessing in disguise – because the qualitative approach to research here has enabled us to gather insights that would not have been available from a purely quantitative analysis. Numbers matter, and through this report we refer to other studies which relied on quantitative analysis – without them, the theoretical basis for this report would not have been possible – but we have been able to generate new insights through this qualitative approach.

Interviewees included educators, organisers, and union secretaries and assistant secretaries. In total, 28 interviews were conducted for this report, and respondents came from nine unions. Between them, those unions covered members who worked in industries which were parts of what the ABS defined (in single-digit ANZSIC terms) as: manufacturing, transport and storage, education, health and community services, government administration and defence, and some with memberships cutting across several industries, not all of which are listed above. The largest unions in the above industries were not necessarily included in the sample.

On average, we would expect that the unions whose staff we spoke to were more advanced in union education and development than unions as a whole, since they were more willing to participate in the project.

2 Understanding union education and development

Several studies, local and international, over the last quarter century have examined union delegate education and development. Most relevant today are some studies examining this issue in the UK, Canada and Australia, discussed below.

The first 'Delegates are Diamonds' project found that delegates who were trained were known to be in workplaces where unions had greater power.² Trained delegates had more confidence, greater self-

² Peetz, D & Pocock, P (2009) An analysis of workplace representatives, union power and democracy in Australia *British Journal of Industrial Relations* 47 (4) pp623-652

perceived skills and scored higher on measures of activism in the workplace.³ Where delegates had been involved in campaigns or disputes at their workplaces this also added to their confidence levels⁴.

A Canadian study of delegates in the education sector found that delegates who had been trained were more influential in their workplaces. This was in part due to being more knowledgeable about collective agreements, but also because they played an important 'bridging role' between the union and its membership⁵. Further, the quality of delegate training mattered, where training was seen as 'useful' it translated into more workplace activism and union success.⁶

The importance of follow-up was also considered in these earlier studies. Follow-up was contextualised as 'on the job' training or mentoring of delegates by organisers. These aspects of follow-up were found to be important for activism and confidence.⁷ Earlier studies pointed to structural issues within unions that presented barriers to effective follow up, along with limitations posed by resource allocation issues.⁸

The importance of the 'on the job' aspect of delegate training was highlighted by UK research.⁹ It found that most activists learnt about being activists through this method as well as from their organisers and through the influence of their union's culture. Union workplace representatives have long been understood as central to union renewal.¹⁰ As the organising model is adopted across the movement, the role of the union delegate has taken on even more prominence. This creates challenges and opportunities, and requires resources and capabilities. Murray et al proposed that union educators should turn their focus to identifying the particular delegate capabilities that were the most optimal for mobilising union resources.¹¹

Some of the studies were talking principally about classroom education of delegates. Yet as some of those, and others discussed later, have also shown, the informal aspect of education and development

³ Ibid

⁴ Clarke, J, Pocock, B & Peetz, D (2005) *Delegates are Diamonds*. University of Adelaide, January 2005

⁵ Murray, G, Levesque, C & Le Capitaine, C (2014) Worker empowerment and disempowerment: What makes union delegates feel strong? *Labour Studies Journal* 39 (3) pp177-201

⁶ Peetz, D & Alexander, M (2103) A synthesis of research on training of union delegates. *Industrial Relations Journal* 44 (4) pp 425-442

⁷ Ibid

⁸ Ibid

⁹ Simms, M (2013) Workplace trade union activists in UK service sector organising campaigns *Industrial Relations Journal* 44 (4) pp 34-442

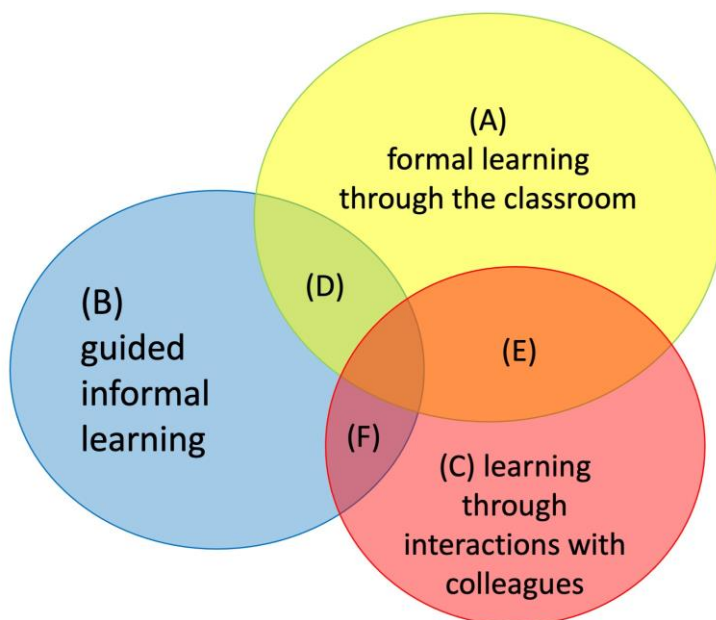
¹⁰ Murray, G, Levesque, C, Dafour, R & Hege (2013) Workplace representatives: strategic actors of union renewal *Industrial Relations Journal* 44 (4) pp340354

¹¹ Murray, G, C Lévesque, and C Le Capitaine. "Workplace empowerment and disempowerment: What makes union delegates feel strong?." *Labor Studies Journal* 39, no. 3 (2014): 177-201.

is also important. Indeed, there is evidence that, without follow-up, resources devoted to training of delegates is largely wasted.¹² To conceptualise how, it is useful to think about the way that union delegates learn, and then the place of union education and development in promoting learning in a form from which unions will benefit.

A simple depiction of the way people learn is at Figure 1. It shows that people ordinarily learn through three mechanisms: formal learning through the classroom (circle A in figure 1); informal learning on the job, guided by a learned or experienced person (circle B); and informal learning through interactions with colleagues (circle C). While there is little in the way of empirical evidence to quantify the relative sizes of these circles, there is in fact a proposition that 70% of learning comes from job-related activities, 20% from interactions with others and 10% from formal education. Clearly the ratio cannot necessarily be that precise in practice – for one thing different occupations vary greatly in their reliance on formal education. A critic online asked ‘Do you want to get on a plane where the pilot is learning how to take off and land the aircraft while you sit white-knuckled in the cabin?’¹³ But it is handy when thinking about how people learn, and the things we need to do to ensure that money spent on training and education is not wasted.

Figure 1: How people at work learn



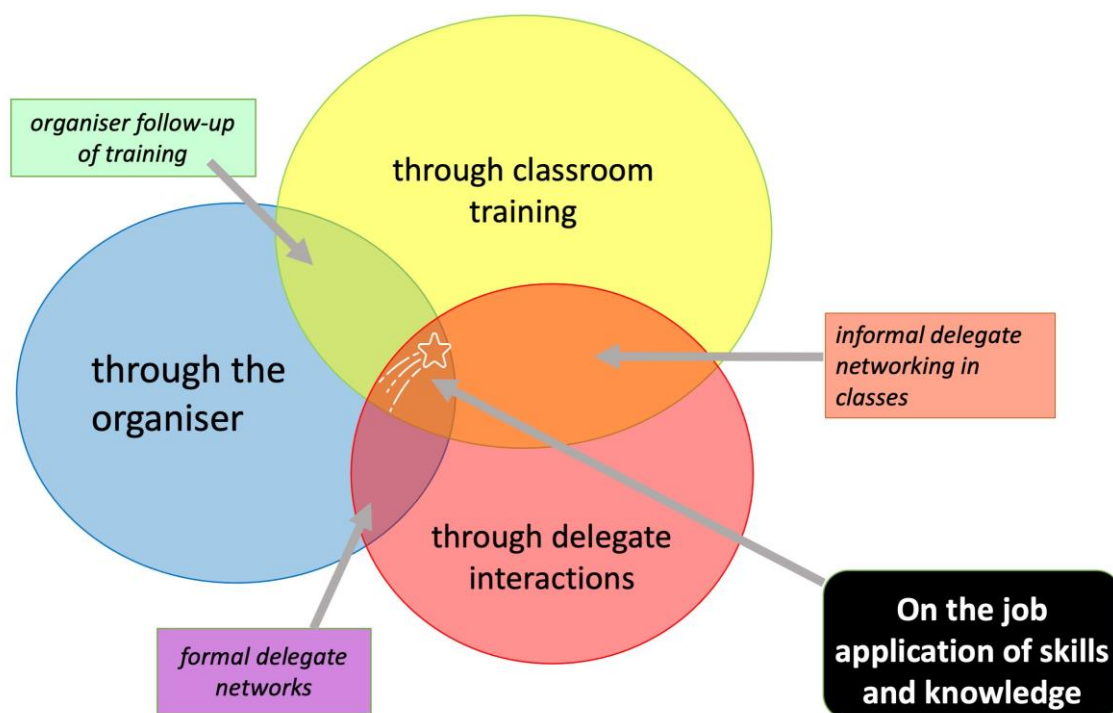
¹² Peetz, D & Pocock, P (2009) An analysis of workplace representatives, union power and democracy in Australia *British Journal of Industrial Relations* 47 (4) pp623-652

¹³ <https://trainingindustry.com/blog/strategy-alignment-and-planning/70-20-10-and-the-concept-of-the-osf-ratio/>

The weakness of that 70/20/10 model is the way that it delineates those three core modes and implies they do not or cannot overlap. In practice, there are considerable points of overlap between them, and that potential for overlap is shown in Figure 1. For example, area D in Figure 1, where formal classroom learning can overlap with guided informal learning, can represent guided learning outside the classroom (for example, in a person's work situation) to apply the lessons from class in that new context, to reinforce the classroom learning. Area E, the overlap between the classroom and colleague interactions, represents within-classroom interactions with classmates. Area F can represent formal networks of colleagues, set up outside the classroom by that learned or experienced person.

This three-spheres model is especially relevant to union delegate education and development, and its application there is shown in Figure 2. At a formal level, union education takes place in the classroom (equivalent to area A in Figure 1). But the delegate also learns through the organiser (area B), and through interactions with other delegates via their delegate networks (area C). Moreover, there is critical learning through workplace follow-up of classroom training (area D), informal delegate networking in otherwise structured classes (area E), and formal delegate networks created by the organiser (area F). All those things come together when the delegate applies, on the job, the skills and knowledge they have obtained through all the other interactions (the central point at which all circles overlap, with the cute little star in Figure 2).

Figure 2: How union delegates learn



This report culminates in a discussion of the issues raised by the effects of these spheres and how they interact, and the way that union delegate education and development systems facilitate or not those critical interactions. Leading up to that, we consider the aims of and participation in union delegate education and development, and the ways unions resource, prioritise and organise themselves to deliver education and training.

3 Aims of education and development

In this section we explore how the union officials that we interviewed described the purposes of their union's delegate development and training programs. We were seeking to understand what the aims of the various programs were. Interviews began by asking the interviewee to talk about the aims and achievements of their union's delegate development and training programs. Those interviewees who were in trainer/educator roles tended to focus more on the importance of skills and confidence development as a key aim of delegate training. This was illustrated by the comments of one educator:

I think primarily it's about building skills and knowledge to be able to both support members in the workplace, but also to build power in the workplace...and to build the skills and confidence of the delegates to be able to effectively represent their members.¹⁴

Another educator put it similarly:

the major aim to the training is really to give delegates the knowledge and the confidence to be able to go out and organise their work sites to build power within those work sites.¹⁵

Others expressed their union's aims as seeking to ensure delegates were equipped with the skills and knowledge to undertake their role:

I think it's really about making sure that our union delegates are educated in relation to their rights and responsibilities in that role. And I guess then if I'm looking big picture, making sure that we're increasing the activism of those people.¹⁶

In some cases, this was an explicit part of the union's strategy, depicted as:

¹⁴ Interviewee 10a

¹⁵ Interviewee 15b

¹⁶ Interviewee 9a

we have the straight up kind of education piece where we're committed to uplifting the skills and knowledge of our delegates across the country, so we have our tiered delegate development [stages 1-3] piece for that.¹⁷

In building confidence in their delegates, unions were also focussed on the bigger picture of building activism and building power in the workplace. They described it in this way:

the main aim [of our delegate training and development], the main purpose is to be able to build the confidence and the skills of our delegates to be able to organise their workplaces and understand the power dynamics in order to be able to win the issues that they are campaigning around.¹⁸

Then we've got to be able to inspire people to want to do the work rather than hand that authority to organisers.¹⁹

An interviewee in a more senior role talked about delegate development in a broader context, describing it as being part of a journey of organising and activism, with training tailored to suit the delegates' level of activity and engagement:

So we really see delegate development and training through an organising lens and through a sort of journey, a delegate journey kind of lens, knowing that delegates will be at different stages of their own development and we have to go to them where they are in that process.²⁰

The importance of identifying and developing leaders was also raised, and some expressed it as having the explicit aim of developing distributed leadership within their unions. This was noted as having the potential to challenge existing power structures within unions:

So our aim is, I suppose, to develop leadership or develop activism and member leadership to the point where we can have proper distributed leadership, so that we would divest some of the power from centrally, from the organisation, and give it to well trained and motivated grassroots members...it's about empowering our members to get to the point where, you know, they would

¹⁷ Interviewee 15a

¹⁸ Interviewee 5b

¹⁹ Interviewee 5a

²⁰ Interviewee 11a

basically be running their own campaigns and they would basically have industrial literacy to the point where they could manage their own...grievances and disputes.²¹

While there is substantial empirical evidence supporting the idea that distributed leadership, or ‘democracy’ within a union, is possibly the most important factor in explaining union success in the workplace — ‘you can’t have power in the workplace if you don’t have power in the union’²² — there was little evidence, beyond this union, that the idea of creating distributed leadership was important for union leaderships. This appeared to us to be one of the two or three unions that took most seriously the challenge of evaluating and improving delegate education and development.

In another union, the experience of running a major campaign and dispute during the period of COVID-19 lockdowns, where organisers were not able to be as physically present as they ordinarily would be, showed the union leadership that their delegates were capable of stepping up:

the campaign in 2021 where it was probably the most member-led, really reinforced and gave everyone a whole lot of comfort around how that looks [distributed leadership]... if we want to pull off effective action to that scale, which is what we want to do to shift the industry, that's what it's going to take. Then we've got to let go of the reins a little and let delegates step into the space that they're more than capable of.²³

This capacity was seen by some as sorely needed. An official in another union referred to the difficulties for their union presented by the phenomenon of ‘collective servicing’, a reflection perhaps of the limitations of the organising model, or simply the realities and practicalities of the paid organiser and time-poor delegate:

our organisers are not actively identifying new blood or working with our activists in a deep and meaningful way because they're incredibly busy solving problems dealing with grievances, attending meetings in the workplace.²⁴

One, more positively, described the ‘reset’ that they saw was underway in their union, centring delegate development and training to all of their organising efforts:

²¹ Interviewee 3b

²² Peetz, D & Pocock, P (2009) An analysis of workplace representatives, union power and democracy in Australia *British Journal of Industrial Relations* 47 (4) pp623-652

²³ Interviewee 15a

²⁴ Interviewee 2c

So, we moved away from this idea of delegate training and development being a kind of external thing that there's an educator, that we enrol people to go off into courses with and hope for the best. We actually embed delegate support through an organising lens and through the work of every organiser day-to-day.²⁵

Similarly at another union there was a deliberate shift to a campaigning approach with a recognition that training and development of delegates needed to be at the heart of that shift:

we've got an ongoing conversation around education and training, a culture of learning had to be at the heart of what we were doing. And that if we want to keep striving to improve and have best practice in what we do, then that starts with delegate and activist development. And that has to be at the heart of every choice that we're making. So I think that was a big moment that lifted our resources in education and training.²⁶

4 Participants

We investigated the way in which participants were chosen for training, including whether and why some delegates and members were included but others were not.

Targets for numbers of delegates to be trained over the course of a year were common amongst the unions and most reported a drop-off in the numbers trained during the COVID-19 lockdown period for a range of logistical reasons.

For some unions there was an intentional focus on ensuring that the delegates receiving training were reasonably representative of the union's overall membership. This generally meant that more focus was needed to ensure women and non-English speaking delegates were invited to training. As one official noted:

You know the confidence of mediocre white men just meant that bloke's not going to step back when it gets around to him, it doesn't necessarily mean he really had a burning desire to [become the delegate].²⁷

²⁵ Interviewee 11a

²⁶ Interviewee 15a

²⁷ Interviewee 11b

Unions acknowledged that the processes for getting delegates to training were often not as inclusive as they would like and often involved shoulder tapping rather than expressions of interest:

We need to scale way up on the number of people that we do that, and I think like open up the doors of who comes into that, there are no official gates that people have to cross to come in the room. But you ask any organiser in the building and they'll say oh, I only send this type of delegate there.²⁸

Training typically focussed on delegates, providing tiers of development that built on each offering. Programs usually started with induction (which was sometimes via the organiser one-on-one) and then moving through levels 1-2, with many unions offering more bespoke programs in addition to the standard. The bespoke programs tended to be focussed on heavy bargaining periods or campaigning activities. In unions where the broader offering of programs was more advanced, those interviewees noted that not being able to train beyond delegates was a shortcoming:

we train a lot of people per year even though.... we are missing a lot, like we're not training deep enough.²⁹

Role clarity for delegates was an issue that arose in some of the unions – what exactly is expected of a union delegate and therefore how are they trained and prepared for the role. An interviewee described the confusion as they saw it within their union:

I think the difficulty has been that the Union has always been very confused about the role of delegates.³⁰

Another interviewee saw a different reason as to why it might not always be able to reach its broader membership:

I think it's the suitability of some of the people, but I feel like they don't really connect with the delegate training program. The more activist oriented people, I feel like they don't think that they have anything to learn from the Union.³¹

²⁸ Interviewee 6a

²⁹ Interviewee 5b

³⁰ Interviewee 12a

³¹ Interviewee 13a

The identification of leaders in the workplace was a constant work in progress and this approach was not always straightforward, as this interviewee observed:

So rather than us just going out and going, hey everyone, we want really good numbers at training. We really think that this is worth doing. It's actually about identifying the leaders first and then going 'hey, do this training – not 'hey, do the training' (first) and then identifying the leaders and work with them. And because you are being I guess, more discreet about who's being selected, you tend to have already then developed a collegiate relationship with them that then allows you to.³²

Another described the process of delegate selection for training as something that they were working on as part of the wider development strategy:

I think there is still at times too much of a disconnect between what's happening with the training program and where organisers heads are out with their delegates. What we've really had to slow down is where organisers were kind of being pressured or rushed to just pick some people, chuck them on the course and that was their job done. Now it's a lot more. Let's work through a criterion for who you're selecting, why you're selecting who you're selecting... Is it connected to a bargain that you're doing or a campaign or a sector plan? Is there a kind of a reason as to is there an organising push for priority for that site? Why do we want to develop them? So then we start to be a lot more specific about who we're selecting. Equally, we've had to work with organisers to not just be picking copies of themselves.³³

As noted earlier, unions were also attuned to ensuring their delegates were broadly representative of their membership in terms of age, gender, ethnic background. If a unionised workplace had a majority of women from the same ethnic background, for example, then efforts were made to ensure that there was also a female delegate from that same ethnic background:

The two key things I noticed was that delegates were a little bit older not necessarily comparative to the membership, but you know that a lot of our delegates would have been leaving the workforce in the next several years. And the gender stats didn't align with our membership gender stats³⁴

³² Interviewee 2b

³³ Interviewee 15a

³⁴ Interviewee 11a

For one union, the selection process for delegate development and training was weak, and this related to inadequate clarity about the delegate's role:

I would have to say in my opinion it's a bit unfocused. It's not ideal and part of this is because of the lack of clarity. Historically, nationally in the [union] in terms of the delegate role there's nothing in the rules, for example, about the role of the delegate. There's been various iterations of policy around delegates and various name changes but there's never been real agreement on how people are identified and selected.³⁵

5 Delivery to participants and the online pivot

Historically, most formal union training has been delivered in physical classrooms, face-to-face. However, a major shift occurred towards online delivery, forced upon unions by the COVID-19 pandemic.

While the shift to online training necessitated by the pandemic happened quickly for most of the unions who were part of this study, there was variable take up of programs depending on the working conditions of their membership (whether they were office based, had good access to IT etc) and whether their members had the capacity to work from home or not. The transition to online was very difficult for some unions as this interviewee describes:

We had to go online and that was that was hugely problematic. Our members were filthy at us for not being able to be on site, but we had an obligation as an employer to not put our staff at risk either and there was also lockdown arrangements and our staff struggled with that digital change. Members struggled with the digital change.³⁶

Innovation was forced upon unions and some unexpected positives arose, particularly with the ability to reach and connect delegates in rural and remote locations. It is an innovation that is likely to be permanent. For some unions it gave them the impetus to refresh and refocus the training and for others they were able to target online materials to particular campaigns:

Actually, it was COVID that helped us deliver some fundamental change. So when we said, OK, we've got to virtually change these programs because they're not face to face. What are they

³⁵ Interviewee 13a

³⁶ Interviewee 2b

going to look like on online? We managed to insert materials that I think are more suitable to union training.³⁷

Improvement in attendance at regional meetings was identified as a bonus, and a change that is likely to be long lasting, along with training for regional delegates:

I think probably it's changed forever and there were some real advantages. We have regional meetings and especially out in rural areas, people would often have to travel for an hour or so to get to their regional meeting. And so, it was just impossible. Well, our attendance at regional meetings once they went to online was much higher and more people were able to be involved.³⁸

Another interviewee commented:

we've experimented a lot. In fact, we think that online is better for our regional delegates because they can access the education programs in a better way, but what we find is that it's better suited to campaign style, like there's a pandemic, let's assess where the safety issues are, give them their rights on safety, give them a task to do, to go away and organise around and then come back and follow-up.³⁹

Another interviewee observed that the shift required during COVID-19 was for them transformational, contributing to a significant uplift in their communications, training delivery and campaigns:

Look, we were dreadful at it before Covid. Really, really shocking. You know, I didn't believe that our members would ever get on the computers or use it. What we did during that period was trial the standard training and it also introduced us to doing shorter, sharper master class sessions as well. Particularly around WHS and COVID responses, it's completely shifted and because so much of our stuff is national, it's made it a hell of a lot easier for us to communicate. And for example, for us to run national strikes in 2021 when I think 4 states were locked down our communication with delegates and everything was happening over Zoom.⁴⁰

A separate, and recent development in delegate development has been experiential, through much less common, member organiser programs. These very bespoke programs were beginning to take shape in a

³⁷ Interviewee 4b

³⁸ Interviewee 4a

³⁹ Interviewee 5b

⁴⁰ Interviewee 15a

number of the unions where training programs were more advanced. These programs typically involved a very small number of activists taking time off the job to be placed within the union for a designated period, to be mentored and embedded within campaigning or organising teams. While not necessarily designed to be so, this often became a fast track to an organiser role within a union. For those who returned to their workplaces there was an observed impact on their activism:

The placement with our union in a training program like that, it's not designed to [train the delegates to] become organisers, it's designed to go back more active in your workplace as a member.⁴¹

For another union the more advanced training was deliberately designed to support potential organisers:

And then the lead delegate program is really where we invite delegates who have had some experience for say, three to four years as a senior delegate, they are seconded off the job for three months into the union office to get a sense of what it's like to be an organiser.⁴²

Finally, in some unions high turnover of members and delegates necessitated a less conventional approach to training and development, with more informal training, generally organiser to delegate, to be trialled. If one of the upsides of the COVID-19 lockdowns was the normalised use of online training, this also was becoming a popular mode for training delegates in high turnover, shift-based workplaces.

⁴¹ Interviewee 5b

⁴² Interviewee 15b

In considering the logistics of delegate education and development, we looked at how unions managed their programs, the resources or priorities given to them, whether and in what ways the effects were measured, and the way in which the key personnel behaved, including the educators, the organisers and the union leaders themselves. It also encompassed the relationship to democratic processes within unions.

6 How unions manage training

Unions typically structured their delegate training programs with a break between the first two days after which delegates returned to work armed with a development plan and some agreed activities that they had worked on during training. Upon delegates' return to complete their training, trainers observed positive outcomes:

Some of the major achievements are when we come back on day three and you really notice you see a shift in people, [some delegates] have signed people up who have never signed up before. We've had people that have gotten into inductions for the first time ever. I've had conversations with organisers to say how they (the delegates) changed and shifted after training.⁴³

Where these development plans were worked on either in conjunction with their organiser or communicated directly to the organiser, the outcomes were generally observed to be more positive.

The active involvement of the local organiser in the training was seen to be able to offer the most impact,

I think where it has the impact the most is where it's supported by the organiser. In my experience and I've been working in unions for almost 20 years, where the organiser is embedded in the training....there's been such a difference.⁴⁴

However, there was a note of caution from one union:

⁴³ Interviewee 5a

⁴⁴ Interviewee 3c

One of the systems that I had to break was what they would do is they bring the organisers in at the end of the training and sit with the delegates and do a plan. We found that the organisers felt that was more of a chore to do than actually understanding what we've done throughout the course.⁴⁵

This issue is expanded on in Part D of this report.

Whatever the limitations of education and development programs, one of the major achievements seen by a couple of unions we interviewed was the establishment of nationally consistent programs for delegates. These were found to be of particular value where unions were organising workplaces in national companies or industries:

The biggest achievement ... is that it is a nationally consistent program. The delegates get trained the same no matter where they are anywhere around the country. There is a consistency and a unifying curriculum and development program, which means that every delegate gets an equal level of education.⁴⁶

Nationally consistent programs were not typical however and many interviewees reported that a lack of consistency across their union with regards delegate development was a shortcoming. This reflected state branch autonomy and structural and historical barriers, including issues from union amalgamations.

Content development

One of the logistical issues we sought to investigate in our interviews was the process of content development, in particular: who got involved in content development, how this process was undertaken and how training courses were reviewed and refreshed. For some unions the process was collaborative and consultative with leadership involvement:

One of the main challenges is keeping everyone happy. There's lots of people. There's a rather large leadership team, so trying to work out who needs to be across it, who needs to understand it and who needs to have a say in it is a tricky one so that it doesn't get bogged down.⁴⁷

⁴⁵ Interviewee 5b

⁴⁶ Interviewee 5b

⁴⁷ Interviewee 4c

For others the trainers were left on their own to develop and update content:

But in terms of updating it to make it relevant to now, that's on me and all of the new courses I'm writing myself.⁴⁸

The process of writing curricula was described as iterative. This interviewee claimed that the process could often be unnecessarily complicated:

I try to write very quickly. We get together. We plan what we want to do and then I'll write it, and then we'll deliver it and then adjust it and it moves through. So we try to do it very, very quickly. We basically made our entire foundational and bespoke curriculum online during the pandemic, everything was done before the end of the first lockdown.... we follow the spiral model, and I found the spiral model is an easy model to write curriculum.⁴⁹

There was also a perceived onus on the union to ensure that training was relevant and practical for delegates. This interviewee stressed what they believed was the importance of getting that right:

Training needs to be very much based on what's relevant to those groups of workers or delegates or leaders that we're training so that they actually then go off and do the thing that they came to be trained about, that they wanted to know about. That's the bit missing bit in a lot of education. It's not relevant to what the delegate wants. So they're struggling with their workplace and they're not receiving the thing that they need in order to be able to organise. It's not practical.⁵⁰

What influenced training and development?

Almost 30 years after its inception the Organising Works program continues to have a strong imprint on the unions that were part of this study, through either former participants, former staff, union networks or broader influences. It was often referenced in some way during our interviews. Organising Works was, however, primarily about developing a strong cohort of organisers throughout the union movement to push structural change toward the organising model, rather than delegate development per se.

Reflecting on that, one interviewee noted:

I think the gap in delegate development is the organiser development if that makes sense.⁵¹

⁴⁸ Interviewee 10a

⁴⁹ Interviewee 5b

⁵⁰ Interviewee 5b

⁵¹ Interviewee 4b

Another offered support for the reestablishment of the Organising works program:

I'm really keen for the org works program to get back up and running. I just think as an initial program to bring people in and to have that time to actually give them the fundamentals and the basics and the cross-union relationships is invaluable.⁵²

The shift to an organising model approach seemed, for most unions, still a work in progress. This was evidenced in references to tensions with delegate activism and union leadership and ongoing review of the role of the organiser as the key interface between the union office and its membership. Not all organisers it seemed were on board with delegate development. One trainer commented:

How [delegate training] could be improved is if organisers could understand how critical it is. They see training as an event, not as a process. Development is a process that never stops.⁵³

Another interviewee observed how, in their union:

I'm not saying we don't have struggles with servicing because we definitely do, but we're really trying to move away from that kind of servicing model to an organising model where our delegates and activists are front and centre.⁵⁴

Comparable to the frequent reference to the Organising Works program was reference to an earlier research project.⁵⁵ The importance of follow-up after training was reinforced and referenced by the findings gained from this study:

We have talked to them [the organisers] about the need for follow-up, and we use all that ... research to say 'if they [delegates] go to workshops and then you don't follow-up, we're actually

⁵² Interviewee 15a

⁵³ Interviewee 4b

⁵⁴ Interviewee 8a

⁵⁵ Peetz, D & Pocock, P (2009) An analysis of workplace representatives, union power and democracy in Australia *British Journal of Industrial Relations* 47 (4) pp623-652; David Peetz and Michael Alexander, 'A Synthesis of Research on Training of Union Delegates'. *Industrial Relations Journal*. 44, no. 4 (2013): 425-42.; David Peetz, Carol Webb, and Meredith Jones, 'Activism Amongst Workplace Union Delegates'. *International Journal of Employment Studies*. 10, no. 2 (2002): 83-108.; Clarke, J, Pocock, B & Peetz, D (2005) *Delegates are Diamonds*. University of Adelaide, January 2005

*doing something counterproductive' and I think that that struck a bit of a nerve, so that was good.*⁵⁶

Coordination and cooperation

In our interviews we explored the question of coordination and cooperation within the union, across the union movement, and with other not for profit organisations. Coordination within unions was mixed, a function perhaps of union amalgamations and autonomous branch structures. One trainer, a long-term educator but new to their union, commented:

*Yeah, I don't really have any kind of connection directly into the national body. I miss it though... it would be valuable for me as an educator to find out what's happening in the other branches of the Union.*⁵⁷

Another noted that coordination within their union had declined over the years as workloads had intensified:

*When I first started, there was probably more sharing, but I think everyone's just got so busy and the irony is with COVID, everyone's more used to working remotely. But I think we're just so busy doing what we're doing.*⁵⁸

An informal network of educators, that operated within this national union, was felt to be of benefit:

*We've got an informal network with all the other [Union] educators and we aim to meet, although we haven't met for a while at least, we sporadically communicate. We've got to. We're trying to do some stuff.*⁵⁹

Coordination and collaboration within the union had to be worked at, as another interviewee observed:

*We've got a monthly team meeting, but we also have fortnightly opt-in catch ups. But I will say we've also got platforms like WhatsApp that we're always communicating on. And we're a pretty tight cohesive team in the sense of we do a lot of co-training.*⁶⁰

⁵⁶ Interviewee 3b

⁵⁷ Interviewee 10a

⁵⁸ Interviewee 4d

⁵⁹ Interviewee 3b

⁶⁰ Interviewee 8a

Across the wider movement coordination and cooperation with other unions was uncommon, with many commenting that they were looking for leadership in this area, particularly around sharing good ideas and best practise. Where collaborations happened, it was more likely to be around campaigning on particular issues. It often worked well where there was appropriate alignment and trust.

*We'll work with [Another Union], we'll work with the [Union], we'll work with the ones that we that we are aligned with, we get along with and we trust to be quite honest. Trust is a big issue here.*⁶¹

At the level of the programs themselves there was not a lot of sharing of training materials or of best practise, despite the existence of some cross-union networks of educators and the like. In part this was due to the specificity of training materials developed for particular contexts. Sometimes [it was] about perceptions, correct or otherwise, about other unions, as this interviewee's comments illustrate:

*We don't [share materials]. I've given my resources to someone from [Another Union] but the stuff that we're doing is often pretty specific. But that's the problem. Or not the problem, I'm not sure what other unions in [my state] could offer us. They don't have as far as I'm aware, dedicated education staff.*⁶²

One senior official expressed their concern about the future of the union movement and how connected each unions fortunes were:

*I feel sick about the future of the movement. I just really do and how are we going to arrest the decline. It's no good for us to be continuing to grow. We're going to be next. The whole movement has to be grown. So what are we to do actually? Work together to grow power in the workplace. We are trying to work with other unions, but that is not always as easy as it should be.*⁶³

We asked but there were no examples found of cooperation or working with other not-for-profits or similar organisations on education and development. The closest discussion we found was when one interviewee observed that their union tended to hire two types of people, described as:

Do-gooder activists and people off the shop floor. I'm better placed in the do-gooder activist kind of category. So I was involved in all kind of direct action groups and climate groups and queer

⁶¹ Interviewee 2a

⁶² Interviewee 3b

⁶³ Interviewee 2a

*groups, I moonlighted as a uni student whilst I got involved in occupying buildings and whatever else.*⁶⁴

7 Resources or priorities

A common theme was constraints — temporal and financial — on the ability of unions to deliver adequate training. But there were different perceptions as to the extent this was due to weaknesses in awards and agreements, resource constraints or simply competing priorities.

Access to trade union training leave, once seen as a standard entitlement, was not a given for many delegates. In those circumstances unions utilised a range of options from offering online training programs that could be accessed out of hours, to delegates using their annual leave to attend training. Where delegates utilised their own leave, this appeared to place additional pressures on the trainer to maximise the experience of training, particularly where the training involved delegates from different industries and had to be more generic.

Access to paid training leave was an issue in a range of industries and sectors. Unions endeavoured to overcome this challenge in a number of ways. Campaigning to restore trade union training was one element. Some unions paid delegates for their attendance, reimbursed employers for replacement workers, or in a few cases delegates utilised their own leave to attend training. One union described their approach to the issue of delegates not having paid trade union training leave as:

*So the idea is that we fund it until we can win it, and then we win it and we enforce it.*⁶⁵

The growth in online training had certainly alleviated some of these issues, enabling delegates to access training in a more flexible manner even in the absence of paid training leave.

Resourcing, in terms of both staffing and money, was a frequent theme. Having sufficient training staff was a common lament and this appeared to have an impact on delegate follow-up:

*The downside is that I think that we don't have enough education staff. I think the organisers are time poor and they don't do follow-up and they take shortcuts when it comes to providing education to people and are sometimes not committed to people's development.*⁶⁶

Another officer explained:

⁶⁴ Interviewee 6a

⁶⁵ Interviewee 5b

⁶⁶ Interviewee 3b

You've got to have the right resources. I think if we had the right resources, there would be more follow-up, not just with delegates, but actually with officials and with organisers getting in and helping that development help on the ground... We can't actually just move the delegate group in isolation, because if they're not supported by organisers who want to help them win and do that on the ground and to hold the power themselves then we've lost what we've managed to win in training and shift them on.⁶⁷

With more resources, another trainer said they would like to see training, campaigning and organising seamlessly coordinated:

I think we see training as pretty integrated with campaigning and organising. So I think we want it to be flowing through all of the campaigning and organising and not like a separate expert or specialist that sits outside or is a bolt on.⁶⁸

Some unions noted that officials felt over-worked:

We have really stretched resources, we've always got these big sorts of imperatives to achieve things in really short time frames, so often we don't have the luxury of time and resources to do all the things that we would like to do so that means that we have to prioritise and that is a real challenge in terms of work volume for staff. But I feel like we should do a lot less hyper mobilising. I feel like we need to pause and it's always hard to pause in when you're having these massive changes ripping through.⁶⁹

Not all unions agreed that resources were the issue, or the barrier, however. Instead they focused on the way unions prioritised the resources they had:

I don't think resources is our issue. I think priorities are our issue...What's our purpose here? We need a better developed purpose.⁷⁰

One senior official described how this happened. While the COVID pandemic and shift to online delivery had solved some issues, it created other wider disruptions:

⁶⁷ Interviewee 5a

⁶⁸ Interviewee 7a

⁶⁹ Interviewee 13a

⁷⁰ Interviewee 4b

We're sort of lurched from one crisis to another in the past couple of years. [Delegate training and development] has really totally slipped down the list of priorities and it's unfortunate that it's one of the first things that happens.⁷¹

8 Measurement

When discussing the aims of delegate training the theme of building activism was regularly mentioned by interviewees. But how might activism be measured? While membership recruitment was not generally touched upon as an explicit aim of delegate development, it became apparent that the former was a well utilised proxy for measuring effects when we asked about the impacts or achievements of delegate development:

what we found is, surprise surprise, that if they're trained and if they're followed up then they're out there recruiting members and just putting the word on active members (to be more involved).⁷²

Reporting systems, where they did exist within the unions that were part of the study, were generally fairly rudimentary or under development. High turnover of members and delegates in many sectors were complicating factors. Some unions had mechanisms for tracking the recruitment activity of delegates. These unions were able to report that delegate training did indeed lead to membership recruitment:

We've looked at delegate sign-up [pre and post training]. How many did they sign up? And then after they come [to training], how many do they sign up? And there is an increase.⁷³

We've got some good numbers that [officer] got that we're just pulling together, people who have done training at least once, twice, that their sign-up rate is much higher than those delegates that have never done training.⁷⁴

Generally, though the overall effects and achievements were observed anecdotally rather than through systematic reporting and access to hard data. As one official expressed it, when asked how they knew if delegate training was working:

⁷¹ Interviewee 10b

⁷² Interviewee 4b

⁷³ Interviewee 7a

⁷⁴ Interviewee 5a

Most of it is the vibe of it, if we're going to be really honest.⁷⁵

Another trainer reported their observations after recently moving to the training role, following a long period of working as an organiser:

I had no idea that delegate training would be so effective until I was in the thick of it and saw it happening and coming home on day three when they report back.⁷⁶

Many reflected that their lack of, or inability to provide, systematic reporting was a shortcoming, and the development of more formalised systems for membership reporting and delegate tracking was an aspiration commonly expressed.

One official claimed that while their computer systems were sound and able to harvest a lot of data, the systems were time consuming to use, and its overall capacity was hampered by wider staffing issues, not just resourcing but union structural issues as well:

[there are]... underlying philosophical issues around member leadership, whatever that is and how that kind of relates to our branch structure.⁷⁷

Another offered a more nuanced perspective on the role of training in the context of union structures and expectations of what delegates will do and what the role of organisers is:

And one of the things that I've noticed – and there's no measurement on this, but just anecdotally – there is a significant drop off in what delegates expect their role to be. So whilst it used to be the case that delegates would routinely sort out issues or attend disciplinary meetings or do a whole range of other things, because quite frankly there just wasn't an organiser there. As we've got more organisers, I think delegates have now been reduced to the person who's got the mobile number of the organiser to call... the training doesn't do anything in and of itself. It's the structures that you have around that.⁷⁸

On metrics and whether delegate outcomes are part of organisers performance appraisals, the comments were more aspirational than celebratory:

⁷⁵ Interviewee 11b

⁷⁶ Interviewee 6a

⁷⁷ Interviewee 3b

⁷⁸ Interviewee 10b

No one [organisers] ever gets performance managed. There's a lot of autonomy, but there could be some more accountability.⁷⁹

There probably could be more structure around being more intentional. And making sure that that follow-up is happening. Just to make sure there's that expectation.⁸⁰

[Delegate outcomes] really should be part of every organiser's plan that they have. And so, either as part of their organiser plan for their own development or as part of their say site plans, sector plans, whatever they've got, depending on what their patch looks like, they should have delegate development as part of that. But this should also be a part of their individual development.⁸¹

Educators sometimes measured success by reference to return rates for delegates to the next stage of training:

The majority of people who've done part one have managed to come back or at least enrol in delegates Part 2, all in the 1st 12 months. So that's a pretty good achievement for this year, given that was one of the one of the things that was indicated to me that they were hoping to do.⁸²

Other more important metrics were acknowledged as being relevant and critical, but were much harder to collect:

it's easy to collect data in terms of joins because the form has 'did the delegates sign the person up?'. So that metric is really easy to retrieve, but it's the other metrics that are difficult to retrieve. Are they doing those representation? Are they doing those inductions? Did they do their mapping?⁸³

Formal evaluation of training was rarely mentioned by interviewees. Usually the closest discussion came to this was post-classroom evaluation, which was common amongst unions. Through this, delegates would be questioned (usually on paper) about what they intended to do after attending training. As far as unions were concerned, the results appeared positive. One educator noted:

⁷⁹ Interviewee 4b

⁸⁰ Interviewee 4c

⁸¹ Interviewee 15a

⁸² Interviewee 10a

⁸³ Interviewee 8a

Certainly in my experience with delegates that I've seen, over the levels of training that the programs we have, delegates are actually out there implementing the stuff we're teaching in the courses.....I think it [training] definitely has an impact.⁸⁴

Post-training surveys were a common way of reviewing and updating training materials to ensure they were fit for purpose:

Well, we review it every year and there's a feedback survey and we [the leadership team] sit down, normally and review the material.⁸⁵

Surveying delegates (in various ways) was mentioned, by several unions, as one of the means by which they assessed success or otherwise. One union was trialling a few approaches:

I don't think we've quite landed on the best version. What we're piloting at the moment, basically, there is a scorecard for the participants, there should be assessments that are done prior to delegates entering in the program. And then as part of the follow-up, there should be an assessment of their participation in the training, but then also what they demonstrate outside of that.⁸⁶

Another union undertook a major phone survey during a relatively quiet time enforced by COVID-19 lockdowns. The survey focussed on activism (what delegates did after training, including sign-ups, taking industrial action and representation), endeavouring to establish where activism peaked and dipped post training, thus establishing what intervention mechanisms were needed and when:

We want to know that they're actually collectively taking action to resolve issues on all measures, were they more active post the course than they were pre the course? What we don't know is the point at which it dips. If it's three months or if it's six months [after training]. That's what we want to build a system to track.⁸⁷

9 The key personnel

One interviewee articulated what appeared to us to be common issues through many unions:

I think that unions have good intentions around delegate training. I see three barriers. In ceding control, so delegate development might mean that delegates get empowered and organised

⁸⁴ Interviewee 15b

⁸⁵ Interviewee 3b

⁸⁶ Interviewee 15a

⁸⁷ Interviewee 5b

and challenge elected authority.... Then I see demarcs⁸⁸ so my view is that an organiser should be able to do development and training, and I mean they're doing the incidental development of their reps anyway, so I think they need to be allowed to be more committed to the formal training.... And thirdly, our follow-up or lack of, so who does it? Our organisers wouldn't do it so we finally said why? What are the barriers to them doing it? And for some they just don't believe in it.⁸⁹

Ceding leadership, the first of those issues raised, was perhaps the sleeper issue amongst the unions we looked at. The reality of what happened, when delegates stepped up, confronted existing structures of power and authority. These appeared to be live questions for elected leaderships, but the specific concept of 'distributed leadership' was mentioned by respondents from only three of the unions we investigated. The respondent just quoted also said:

Do we want to distribute leadership? You say you want your activist leaders to operate autonomously. But then when they do, its questions asked, or concerns are raised. I think that what they [union leadership] want delivered is hard to achieve unless you do cede a little bit of power and control. You can develop leadership and that doesn't mean that you're under threat.⁹⁰

While the personnel key to achieving fundamental reform within unions may be the leaders themselves, in understanding the logistics of delegate education and development, it is the educators and the organisers who are the key personnel.

The trainer/educator role appeared to be evolving in some of the unions that were part of the study, moving away from the traditional specialist educator to a more blended role of organiser-educator. Such blending combined an organising 'patch' with responsibilities for developing and delivering training. Describing how they saw the dual role and how they managed the potentially competing responsibilities, one interviewee stressed the importance of the credibility that was gained from continuing to be an organiser whilst also running training:

I think having an organiser in the training room who's connected to organising currently is really useful for that because you've got ideas and solutions that are fit for purpose. I think

⁸⁸ Demarcations between staff, analogous to demarcation disputes between unions over coverage.

⁸⁹ Interviewee 4b

⁹⁰ Interviewee 4b

that it's really good for us [trainers] to be connected to organising and not like lose touch, because it's your credibility.⁹¹

Those in educator specific roles tended to be long serving staff with extensive experience in the role. This sometimes led to concerns about silos and lack of connection between the various functions within the union office and between different branches and states:

I sometimes get this crazy notion that people don't have any idea what I'm doing in the [training] room, you know, like, all training's good. They had a good time. Thanks for that. I know that organisers get very busy. If their delegates get into training and they're happy I can see why they go it's OK. They're happy. But I would love to have a closer integration between what the union objectives are strategically and what the training objectives are.⁹²

Sometimes innovative programs were not thought through to account for the uncertainties that would arise when the programs were completed, for example to the career paths for member-organisers beyond that secondment. These programs are in their early stages, so it is not surprising that outcomes may not have been given close consideration. One union did assert, however, their aim to have delegates empowered to deliver some training over the next five years or so, as acknowledged by this interviewee:

It's about building up capacity in our non-trainers at the moment... we've got [a small number] of education staff⁹³

Skills and development of Organisers

In the unions that we interviewed, it was typical for training staff to also run programs for union organisers. Many interviewees saw this as a very key part of the development function. In those training programs, integrating delegate development into the broader work of the union were areas of focus as this interviewee described:

⁹¹ Interviewee 7a

⁹² Interviewee 10a

⁹³ Interviewee 15a

We've created a whole organiser program now, a program for new starter organisers for our regular organisers and the lead organisers. A big part of that is how they work on delegate selection, delegate development and part of that is how that interacts with the formal training.⁹⁴

Another observed that:

There's always the tension between skills and knowledge.⁹⁵

How training was integrated across the union, both the formal and informal, and the role of the organiser within that was discussed and acknowledged by a long term trainer:

So most of our organisers, I would argue do [provide] some sort of training. [They] talk about particular issues, most of them would be looking at that issue or presenting that issue in terms of 'here's some information, but here are the skills. Here's what you can do'... Where does organising start and finish and training start? I think they overlap, and I don't think that's a bad thing. I think that's a good thing.⁹⁶

Some framed discussion about the role of the organiser through education:

I think it's a more philosophical discussion about what the job of an organiser is...what we're trying to do in our union is to break down that barrier and see that what you're doing in all of those interactions ... with members is education. It's an informal kind of day-to-day education, and sometimes the more informal kind of classroom education is what they need to be doing as well.⁹⁷

There were acknowledged tensions around the work of an organiser and their role in training:

Are we fixers or are we educators?... With organising, you've got a goal and you've got to meet the goal. You've got to get that outcome and so that becomes very task orientated. For educating, there's no end goal point except emancipation. And so you're always on that journey. We can't do one or the other. We've got to find that point where it merges.⁹⁸

⁹⁴ Interviewee 15a

⁹⁵ Interviewee 4b

⁹⁶ Interviewee 4d

⁹⁷ Interviewee 3c

⁹⁸ Interviewee 3a

This question — are organisers fixers or educators — encapsulated many of the challenges facing unions in the way they structure the relationship between organisers, delegates and workplace issues.

Taking this further, another respondent argued that the focus of training and development needed to be re-directed toward organisers rather than delegates. This was how that respondent would use more resources if they were available:

You know what I would do if I had my way, which is not about money, I would actually run a whole lot of organiser training and completely change the role of the organiser because that would be the key to then doing the delegate development. I think that's the block. We do a lot of training of our organisers on how to sign people up when we actually need to teach them how to teach delegates and leaders to sign people up.⁹⁹

Broadening the training capability was sought by another respondent when asked about whether they felt the union could devote more resources to delegate development:

it's about building up capacity in our non-trainers at the moment. What we now want to do is with our lead organisers in particular, or our senior organisers, is have them increase their training capacity and confidence and then also our senior delegates [have them deliver training].¹⁰⁰

Another interviewee similarly observed that there could be more benefits to training union staff than training delegates:

I think it's more about the Union staff than it is about the delegates. I think some teams and some parts of the Union don't get that it matters what they do or don't do. They just think, some of them, that training just fixes stuff, which it obviously doesn't.¹⁰¹

This raised issues of role clarity, including of boundaries between organisers and trainers and how those roles were conceptualised:

I think we still struggle as a union, and I think it's a struggle that's replicated across the movement whereby the role of an organiser is still seen as being the fixer rather than an educator. And I think that there's a paucity of understanding about how being an educator enables you to organise, and the difference between organising and education and the benefits

⁹⁹ Interviewee 5b

¹⁰⁰ Interviewee 15a

¹⁰¹ Interviewee 7a

*of one versus the other... I think it's about a lot about the way we bring people in and set the expectations and the way we manage internal culture around task setting and expectation setting.*¹⁰²

¹⁰² Interviewee 3a

Follow-up and Networks

Arguably the most important aspect of union education and training is follow-up. We know from existing research that trained delegates who received follow-up contact from organisers after training were more likely to show increased union commitment, and that the more frequent the contact, the greater the increase in commitment (delegates with higher commitment levels had higher activism levels). The data also suggested that the impact of follow-up is not so much on the specific skills covered in a particular training course as on the linking of those skills to the broader responsibilities of union delegates. Training was most effective when delegates changed the way they carried out their role and put into practice the ideas or lessons from the training, perhaps by implementing a workplace plan.¹⁰³

Follow-up to formal training can thus be thought of as part of a broader set of activities that can be grouped together under a heading we call 'informal training', which encompasses not only what might be thought of as 'on the job' training of delegates by organisers, but also the more general mentoring of delegates that organisers may undertake. Through this mentoring, delegates can learn much that they can apply in the workplace.

10. Follow-up

One of the organisers expressed those ideas succinctly when discussing the role of educators, saying:

It's that 70/20/10 principle around education, that their job is to connect that 10% of learning that's happened in the room with ...what's going to happen out in the real world. And to help bridge that gap from theoretical learning, role play, that classroom style, into what lived experience will look like.¹⁰⁴

One of our interviewees considered certain types of workers had very different learning styles:

¹⁰³ Peetz and Alexander, 'A Synthesis of Research on Training of Union Delegates'.

¹⁰⁴ Interviewee 3c

*We want to...get them to do things practically, because they'll learn that way – especially blue-collar workers, they learn through the doing.*¹⁰⁵

While the relative importance of formal education, on-the-job experience, and personal interactions will inherently vary between occupations, it is clear that all are important for learning, and formal education is of little or no value if not accompanied by complementary on-the-job experience and interactions.

The unions that we studied varied in the emphasis they put on follow-up, but there was only one — a very small one — that told us ‘there’s no real follow-up’.¹⁰⁶ There were, however, differences between what unions wanted to do, and what actually happened. One commented that follow-up ‘requires a much more rigorous approach’¹⁰⁷ while another said:

*We do have a Delegate Development plan that the organisers can use for each delegate. However, I just don't think that it gets implemented or followed up on that well, to be honest.*¹⁰⁸

A senior official referred to:

*the conversations we've been having and we continue to have, around recognising the importance of follow-up, but the difficulty of getting follow-up landed.*¹⁰⁹

Another saw the importance of thorough follow-up for maintaining the confidence of delegates. Earlier research has shown how critical confidence is in maintaining delegate activism, and that follow-up boosted confidence.¹¹⁰ But on some occasions:

*We've sent them to training. So why aren't they [more active]? Well, because they could have tried to recruit a member, and be told to get stuffed. They're human beings. They've lost their confidence because of that reaction. Development is a process that never stops.*¹¹¹

As one senior official said:

¹⁰⁵ Interviewee 5b

¹⁰⁶ Interviewee 1)

¹⁰⁷ Interviewee 12a

¹⁰⁸ Interviewee 13a

¹⁰⁹ Interviewee 3a

¹¹⁰ Peetz, Webb, and Jones, 'Activism'.

¹¹¹ Interviewee 4b

*that's what the purpose of our union is: to grow confidence, power and capacity.*¹¹²

Some organisers recognised the limitations of what they presently do:

*I think overall we do a really good job with educating our members and our delegates...The barriers really come in our follow-up practices and processes.*¹¹³

These often were due to time. Several respondents referred to lack of time as a difficulty even they had – ‘it's not occurring due to competing priorities’.¹¹⁴ Some saw the adverse effects:

*Problem was the organisers were too busy and wouldn't follow it up. And it actually had detrimental results because...if people don't follow-up, you might as well not have trained them in the first place. That's the greatest obstacle, organising a follow-up.*¹¹⁵

One interviewee, quoted earlier, identified three barriers to the way organisers handled delegate development: difficulties in ceding control, demarcations between organisers and educators, and lack of follow-up. On that last point, we observed ourselves how some organisers did not see follow-up as central to delegate development. Yet the research mentioned earlier shows how integral it is to the success of education and hence of delegate development. Seeing the linkages could make the time problem less serious. People could genuinely recognise follow-up was part of the development process if they were:

*seeing the interconnectedness of it all. So, time is one of those enemies that organisers will always talk to you about. 'I don't have enough time to do this.'...They see that there's competing union priorities for them. The follow-up...falls to the wayside. It's seen as not the priority because 'I've been told I've got to go and recruit' or 'we've got to mobilise as part of this campaign'... Where they see it as being all connected, then time becomes a little bit easier because it's already factored in, as the work's more integrated.*¹¹⁶

A fairly senior union official could reflect on their own background, and the importance of thinking differently about the time issue:

¹¹² Interviewee 2a

¹¹³ Interviewee 3c

¹¹⁴ Interviewee 2b

¹¹⁵ Interviewee 3b

¹¹⁶ Interviewee 3c

It was actually just lack of time and probably not valuing and understanding the importance of it...Having been an activist, there was a certain level of assumed initiative on behalf of the members that they would be part of that solution as well...It is still something that falls off the radar of the organisers a lot. It's seen as something that's secondary... It's just purely time. The organisers putting time in their diary. It's about thinking differently about how they do things...creating systems of work that incorporate this mentoring and coaching with your key people.¹¹⁷

That official saw the problem of ceding control, mentioned above by another union official, as a failure to recognise the benefits of 'distributed leadership'.¹¹⁸

11. Administering follow-up

Should it be the educator or the organiser? The issue of who does the follow-up is a vexed one. As one respondent said, 'we still haven't worked out those connections'.¹¹⁹

Many of the preceding quotes have focused on organisers, and that reflects the fact that, for most of the unions investigated, it was considered to be the organiser who should be principally— but not necessarily, exclusively — responsible. Said one educator:

it's hard for me as the educator to be able to track what they've done, with the exception of in between part one and Part two. We give them tasks and then we check the tasks and see how they're doing and give them that sort of support. But once they're back out in the field, it's really the relationship between the organiser and the delegate, and I don't necessarily have a lot of control or feedback around that.¹²⁰

In that preceding comment, 'part one' and 'part two' refer to stages of the initial delegate education course: some classroom training happens in 'part one', the delegate then goes away with allocated tasks, and comes back for 'part two' of classroom education, during which the educator is following up on what they have done.

There were mixed views on the potential role of educators. One respondent said:

¹¹⁷ Interviewee 2b

¹¹⁸ Interviewee 2b

¹¹⁹ Interviewee 10b

¹²⁰ Interviewee 10a

In some places we've got more capacity for the educators to get in there. Some organisers want to do the follow-up. Some organisers...are quite heavily involved with their delegates and...see they're their delegates...We've also got some very confident organisers who are more than capable of doing it and understand how training fits in and that they're bringing people to be inspired.¹²¹

Another view was more focused just on organisers:

Organisers need to do the follow-up. The educators can't. The organisers have the longer-term relationships... It's a longer journey that the organiser builds in. I've got two educators. They don't have the capacity to do that work.¹²²

One educator saw it similarly:

if you don't follow-up delegates after training it's actually worse for them. I'm very committed to that. They need to have ongoing kind of connection with somebody from the Union. It's hard for it to be me because I'm in the training room all the time. I would do it in a heartbeat if I could. So I always generally try to make myself available to delegates after training. But really, that relationship should be with their organiser.¹²³

Organisers were seen as critical in converting theoretical classroom knowledge, even with simulated situations, into actual situations, such that their job was:

to connect that 10% of learning that's happened in the room with what is going to happen out in the real world...sometimes knowing where to start and knowing how to have those conversations and knowing how to have that coaching role with their members.¹²⁴

The need to connect what delegates were doing with what organisers were doing was pretty clear. One respondent described it this way:

The teams that actually have plans, that are responding to the issues that members and delegates themselves raise, seem to get good outcomes, and have stuff happening. Then

¹²¹ Interviewee 5a

¹²² Interviewee 2c

¹²³ Interviewee 10a

¹²⁴ Interviewee 3c

*there's some teams where the delegates might come to training but the things they talk about are not necessarily what the organisers are always doing. There can be a disconnect.*¹²⁵

But how does the organiser know what is covered in training?

*We're trying to make sure we tell the organisers after training about what's happened: how the person was; what aspects was really good in the training; things they might need to work on; what they need help with. We've generally drawn out the key issues on sites' barriers to them organising their vision for what they want to accomplish on their site. So all that can feed back into the organising. Sometimes we've got organisers who come into the room to do bits like mapping or something like that, so they can hear some of it first hand, if there's a large group of their members in the room.*¹²⁶

Though it depended on there being a good organiser coverage in that area:

*We've got some members who in areas that don't necessarily have a heavy organising [presence] and so it's harder to make sure those people stay in the loop of things to come. But where we've got organisers on the ground...we can do some follow-up.*¹²⁷

Sometimes this connection was ensured by having the organiser attend the training course:

*Having an organiser in the training room who's connected is really useful because you've got ideas and solutions that are fit for purpose.*¹²⁸

But that did not always work, as indicated by a respondent quoted earlier who felt organisers thought it a chore to sit in on training.¹²⁹ There was an interesting and potentially powerful solution to this problem:

So instead, now we co-train. We've actually had some Leads and Coordinators, who are not part of the training area, run training all by themselves, off the curriculum. We want to get to a place

¹²⁵ Interviewee 7a

¹²⁶ Interviewee 5a

¹²⁷ Interviewee 5a

¹²⁸ Interviewee 7a

¹²⁹ Interviewee 5b

*where the teams themselves can run the training because that'll build the follow-up in a more concrete way.*¹³⁰

One organiser spoke of how the training with the greatest impact often occurred when the organiser was 'embedded in the training'.¹³¹ Another union also went some way towards this, partly for the expertise of organisers, but also to build organiser-delegate connections, though this seemed to only happen in regional training sessions:

*Sometimes the organisers know the people beforehand. Other times they don't, but by the end of the day, they've got quite a good relationship. Over lunch they've sat and talked, as well as through the course. Those are good to do that follow-up because the organiser is in the room.*¹³²

The formal structures of training in several unions seemed set up to enable follow-up by the organiser. It may not have required organiser attendance at the training session:

*Every delegate writes a plan when they leave. They're told that their plan is being given to their organiser. Their organiser is expected to call them about making that plan happen in their workplace...Follow up is served on a platter. [It] should be nigh on 100% completed.*¹³³

That said, several unions organised things so that follow-up in different forms was undertaken by different people – by both educators and organisers. In one union, after delegates had developed, in the first training session, a plan that was shared with the organiser, the (follow-up) session was like this:

*The first part of the half-day is looking back at what they've tried, and they share that. We put them in groups with their organiser. Most of them have met their organiser before – but not always, so we know that, at least on that day, they will meet them. And then the second part of that half day [is] looking towards the future, 'what else do we need to do?' or 'what's the next step?'*¹³⁴

In another union, it starts off highly structured:

¹³⁰ Interviewee 5b

¹³¹ Interviewee 3c

¹³² Interviewee 4d

¹³³ Interviewee 11b

¹³⁴ Interviewee 4d

in Delegate 1 and 2, they do a structured workplace plan that was created by [an educator] to give them some 'non negotiables' and things that they have to do in that space, and then they can choose what other things they might want to do over the next 12 months. [The educator] was summarising those documents into a spreadsheet [with information on] the organiser, the workplace, the union rep's name and their summarised dot points of what was on their workplace plan. The organising team goes into that document... Initially they wait for the contact from the union delegate because part of their 'non negotiables' is to contact the organiser. If that doesn't happen then [the organiser's] job is to contact that person... They generally have a conversation with me, to make sure that that contact's actually being made [and to confirm that] this person's come in from you to do Union Rep One.

If they're really good, they've followed their plan, they've worked really well with their organiser, I'm going to suggest they do Union Delegate Two. It also gives us an opportunity by doing that follow-up to go 'this person's not really the right person for the job and maybe we need to work out if we can get them out of the role and get somebody else in'. It doesn't happen very often...If there are red flags, we're able to identify them before they become a major issue.¹³⁵

While earlier parts of this report discussed how unions have grappled with the online vs face-to-face issue in training, some found a way to integrate the two in follow-up:

The initial training may have been face to face for a day, or it might have been online. But the follow-up is an online session. We use that to ask them what have they done. We say...even if it's not a success, whatever you tried, and we ask people for their top tips...We put them into groups, they share it with each other.¹³⁶

The approach, of starting with face-to-face meetings, before moving online, was consistent with older research from business showing most businesspeople preferred face-to-face to online meetings, due to their impact in building stronger relationships, enabling the reading of body language and facilitating social interactions and bonding.¹³⁷ Once bonds and trust were established face-to-face, online meetings could flow better and be logistically practical.

On frequency of contact, a senior official from one union spoke of:

¹³⁵ Interviewee 9a

¹³⁶ Interviewee 4d

¹³⁷ C Rizo et al, 'Business Meetings: The Case for face-to-face', *Forbes Insights*, 2009, https://images.forbes.com/forbesinsights/StudyPDFs/Business_Meetings_FaceToFace.pdf

*monthly individual contact with all of the delegates in your patch... It could be 'you're interested in this issue and there's a webinar coming up'. Or I'm speaking to them every week, cause actually we've got a dispute in their workplace.*¹³⁸

This was integrated into organisers' individual work plans, but they were still 'looking at more ways to integrate that into our membership system' as that information system was 'quite new to us' but seen as having lots of potential.'¹³⁹

One union was trying several different things. Sometimes the:

*trainer went on the road with [delegates out of training] and they went and visited a whole bunch of workplaces to ask workers to join the Union. So we want to build in practical on-the-road follow-up with new delegates, because we do it with our organisers, but we don't do it with our delegates...What could be a thing we do [at] six months [is] take them out on the road instead of bringing them in the classroom.*¹⁴⁰

*One of the other things that one of the organisers did, which I loved as an idea, was as soon as workers were elected as delegates, he used the first day of training leave to sit them in the lunch room and talk to all the workers in that lunch room and introduce them. We're thinking that might be the follow-up from the day three. The thing that's missing is the practical application where they can go and do it.*¹⁴¹

An important aspect of any delegate development plan is continuous evaluation:

*It should always be reviewed, always, or regularly anyway. So we'll see how it could be improved.*¹⁴²

There is no single, simple solution to making it work in every union:

*We're trialling things and then reviewing ...how to do that follow-up...If it's not easy that's a barrier. It means it won't happen...We're creating things based on what we're finding is working.*¹⁴³

¹³⁸ Interviewee 11b

¹³⁹ Interviewee 11b

¹⁴⁰ Interviewee 5b

¹⁴¹ Interviewee 5b

¹⁴² Interviewee 4b

¹⁴³ Interviewee 7a

12. Networks

The third area in the 70/20/10 model mentioned by one organiser earlier, and the third sphere in Figure 2, is *interactions* – in this case, interactions between delegates. These interactions occur through networks.

Effective networks are a combination of strong and weak ties,¹⁴⁴ such that delegates sometimes do not recognise they are part of a network. Earlier quantitative research from the 2011-2013 period showed that organisers were key to the creation of internal workplace networks (though they did not necessarily establish them) and in providing a bridge for delegates with external networks. They were the key support person for many delegates. Networks took a variety of forms. Only a minority were formalised. A majority were mainly internal to the workplace. Social media were probably underutilised then; they were rarely used for creating or maintaining networks, and there seemed to be little intention of using them more.¹⁴⁵

In other findings from the same research project,¹⁴⁶ delegates who thought their networks worked better also considered the union had more workplace power than did delegates with low-effectiveness networks. Formal networks were more valued by delegates and associated with higher union power than informal networks. When delegates had been trained or shown by their organiser how to develop networks, given opportunities to meet activists from other organisations, and were confident in developing networks, they considered their networks more valuable than in the opposite situation. When delegates' opportunities to meet delegates or activists from other workplaces or other organisations had gone up, the success rate of the union in their workplace had also gone up.¹⁴⁷ On the other hand, delegates were twice as likely to quit their role if they were not part of a network, if their networks were informal rather than formal, and if the networks were entirely internal rather than also

¹⁴⁴ M S Granovetter, 'The strength of weak ties', *American Journal of Sociology*, 78(6), 1973, 1360-80.

¹⁴⁵ David Peetz et al., 'The Meaning and Making of Union Delegate Networks'. *Economic and Labour Relations Review*. 26, no. 4 (2015): 596-613.

¹⁴⁶ These findings were unpublished. However, the methodology was reported in the *ELRR* study cited above, and findings were outlined in D Peetz, 'Education, delegates and Organisers and all that jazz', presentation to Trans Tasman Educators Conference, Adelaide, October 2015.

¹⁴⁷ For example, where delegates said that their opportunities to meet delegates or activists from other workplaces had gone *down*, only 11% reported that the success rate of the union in their workplace had gone *up* in the past year. But where delegates said that their opportunities to meet delegates or activists from other workplaces had gone *up*, 50% reported that the success rate of the union in their workplace had gone up in the past year. The comparable numbers were 12% and 56% respectively when looking at whether their opportunities to meet activists from other organisations had gone up or down.

external.¹⁴⁸ In focus groups associated with that project, delegates identified their networks as crucial to their ability to resolve issues or build union strength in the workplace.

Networks are of interest to this report, not just because of their role in developing union power and retaining delegates, but also because the interactions that networks enable are a crucial part of learning, and therefore potentially relevant to follow-up. Just as the lessons from formal classroom training need to be cemented through organiser follow-up, so too the lessons may be reinforced by delegates' subsequent engagement in networks – or weakened by the lack of such engagement.

In investigations for this report, staff from some unions recognised the importance of that:

*for me as a union educator, obviously the most important part of the training is so little to do with what I'm training and so much to do with what they're teaching each other.*¹⁴⁹

For some, this was clearly about developing networking amongst delegates not being given the attention it should be:

*I don't think networking is really front of mind...It should be...but we're not there yet.*¹⁵⁰

Occasionally a union would consciously set up networks:

*we have separate networks that we've been setting up through our organising team that have been...coordinated by their local organiser. [Members] can see that the issues across the district are connected.*¹⁵¹

Networking would, it was hoped, be ultimately built into training, both of organisers and, through them, member-leaders:

*The idea is the organisers work directly with our member leaders, and networking will be an education module, and the organisers will work with our member leaders to sort of facilitate that. But we haven't gotten that far.*¹⁵²

Ultimately, networking was about the:

¹⁴⁸ For example, the quite rates over the period between contacts between researchers and delegates (typically 12-18 months) were 12% amongst delegates who said they were part of networks, and 25% amongst those who did not say they were part of a network.

¹⁴⁹ Interviewee 10a

¹⁵⁰ Interviewee 2c

¹⁵¹ Interviewee 3c

¹⁵² Interviewee 2c

need to set up systems that aren't reliant on the organiser being the face of the Union, the organiser being the gatekeeper to everything...So Facebook's been really helpful with the members around setting up their own Facebook groups, particularly to keep people up to date, informed, put resources in there. I've had to work really closely at not having the organisers be the moderators of those pages.¹⁵³

This last point was as much about preventing union work from being a 24/7 role for the organiser as it was about building delegate self-sufficiency as a principle. Delegate networks may take union resources to develop, but in the long run they should free up union resources and give unions access to more power resources.

Reflecting the point from earlier research, discussed above, that showed the value of external networks, some (but not many) individuals emphasised building networks outside the union:

I always try to make sure that that all our reps are aware of these other additional networking opportunities and workshopping skills development stuff that's outside of the Union, so that they see themselves as a bit more than just [this union].¹⁵⁴

One educator and organiser pointed to the importance of networking after members had finished a training course, in effect as an informal follow-up:

It's great they've come into training and learned some stuff and had a good experience. But they're left. They're left isolated and without capacity to implement some of the work that they want to do, or they're isolated from others within their networks...Isolated from 'how do I you know?', 'what's my starting point'? We shift it back onto the individual member to make those changes rather than integrating it as part of as part of collective action.¹⁵⁵

They described how when:

members have had a positive union experience through education they've met other members they've connected around. They've found the areas of commonality and they've formed their own informal networks. Even in the course of one or two days training, they see that they're a part of something bigger. They're not feeling perhaps as isolated...and they feel more of a part of the movement.¹⁵⁶

¹⁵³ Interviewee 2b

¹⁵⁴ Interviewee 10a

¹⁵⁵ Interviewee 3c

¹⁵⁶ Interviewee 3c

Sometimes networking opportunities arose from delegate meetings or conferences:

we have an annual delegates conference, which is another part of their development. It includes workshops. It's usually a couple of days long...Some of them are a lot smaller than others, but then you're drawing people out who may not have participated actively in union things for a while. There might be quite active in their workplace, but not connecting with others. And our focus on the regional conference this year was setting up regional delegate networks.¹⁵⁷

Even a union which did not engage in much follow-up referred to how 'the networking that they do during those breaks and stuff is invaluable,'¹⁵⁸ even though most of this communication was online. Some other unions consciously did this:

We try to make sure they got a decent time for lunch because they like to talk. We try to mix up the tables and give them a chance to do that. There's not a lot of time. One of the things we learned...is people need informal and formal time to network, and we can't really do it in too much informal time. But people do tend to stick around after training to talk, and making sure they've got a decent lunch time gives them avenues to actually talk to, together and share. We make sure there's enough opportunities to share their story and to talk about the issues on their sites and things are relating back to them in each of the groups.¹⁵⁹

With developing networking through meetings and conferences, one issue was whether to mix delegates up at tables and lunches (exposing them to lots of different experiences), or put delegates in similar workplaces together. It was a question of breadth versus depth. One union in effect tried to do both:

One of the things that we try to avoid, in our foundational courses, [is to have] the same delegates from the same sector. We actually want to have cross sector [networking].¹⁶⁰

So, that union builds 'cross-union solidarity' through:

cross-portfolio networks [in] foundational training, where every delegate learns the same thing around the country. Then we have on top of that...industry conferences and other meetings that are more either general to the state or to the sector where they come together. In the safety

¹⁵⁷ Interviewee 10a

¹⁵⁸ Interviewee 1)

¹⁵⁹ Interviewee 5a

¹⁶⁰ Interviewee 5b

space, we built a Facebook page where every HSR could come on to a Facebook group and talk to each other all around the country about safety and organising around safety.¹⁶¹

It thus makes some use of social media, which still not many unions do very effectively. It used that platform in other ways, mixed with more face-to-face activities:

We've got a Facebook group ...to share your actions and build solidarity and networks amongst our members and delegates...but we haven't gone as far as building an online network, which is one of the things we've been thinking about. Because we want to be able to get what happens in the training room happening outside the training room...If there's a strike, an action, we take our delegates out of the training room and on the road with us...and what that tends to do is build networks where the delegates in the training room are working on a campaign outside the training room with another group of delegates. That's been the strongest in building networks of support.¹⁶²

The limited use of social media by Australian unions contrasts with that in some other places, especially the USA, where a bespoke app ('WorkIt') was used by a union offshoot, 'OUR Walmart', to mobilise Walmart employees.¹⁶³ The WorkIt approach has been attempted in Australia,¹⁶⁴ and some unions even created new organisations using Facebook groups,¹⁶⁵ but with limited success to date. What is newly interesting in the particular context of this report, though, is the potential for use of social media as part of a follow-up or networking strategy, albeit with limited application to date.

¹⁶¹ Interviewee 5b

¹⁶² Interviewee 5b

¹⁶³ Eduardo Munoz, 'Walmart Warns Workers Not to Use App Helping Them Understand Company's Labor Rules'. *RT*, 17 November 2016, www.rt.com/usa/367062-walmart-worker-app-workit/; Andy Kroll, 'Walmart Workers Get Organized—Just Don't Say the U-Word'. *Mother Jones*, March/April 2016, www.motherjones.com/politics/2013/02/our-walmart-black-friday-union/. By mid-2017, the app had seen cumulative totals of over 150,000 Walmart employees from 3,100 stores engaged in discussions, with 50,000 per week seeing messages from OUR Walmart and 40,000 in private groups linked to the organisation (Source: Discussion with and talk by Dan Schlademan, Co-Director of Organisation United for Respect, Sydney, 26 June 2017).

¹⁶⁴ David Marin-Guzman, 'How "Young Tech Dudes" Are Decentralising Unions with Blockchain, AI'. *Australian Financial Review*, 28 December 2017. Ignore the blockchain in this article, focus on the AI.

¹⁶⁵ Anthony Forsyth, *The Digital Picket Line*. The organisation he refers to in chapter 6, Hospo Voice, has since been 'decommissioned'. For analysis, including ten lessons from the experience, see the United Workers Union's report, Petterson, T. (2022), *Australia's First Digital Union: Final report*, United Workers Union, Docklands.

13. Conclusions

Union education and development is critical for union survival and growth. Overall, the study showed that major advances have been made in union delegate education and development, given the array of challenges facing the union movement. Although we cannot speak for Australian unions as a whole, amongst the unions that we studied, all that were large enough to have the resources for a significant delegate development function were engaged in development activities that were, on the whole, beneficial. The evidence from this study, reinforcing that from earlier quantitative studies, is that education and development activities are promoting union membership growth and probably activism. Some unions were engaged in innovative actions in this area that could be emulated by other unions, though sometimes not fully thought through to the post-completion situation.

While the forced shift to online training and education during the COVID-19 pandemic had some immediate and obvious disadvantages, it also provided some benefits. It enabled (or required) unions to develop their online teaching materials and technological skills much more rapidly than would otherwise have occurred. It enabled easier participation for remote and regional delegates and made participation easier for delegates without access to paid union training leave. It enabled easier use or tracking of follow-up activities. More generally, the use of online technology often led to higher turnout at union meetings, especially if called on short notice. Thus, while union education and development is moving back towards a greater face-to-face component, it is unlikely that it will revert to the previous situation and much greater ongoing use of online technology seems inevitable.

Those things said, there were still significant areas of education and development in which improvements could be made.

In some cases, choosing delegates for participation in training and education was not very systematic, and while some paid special attention to gaining broad representation that accounted for the issues face by women, migrant and disabled members, not all did so.

Unions typically did not have the information systems to systematically track delegate education and development, particularly for evaluating its effects. The benefits of training and development were

reported anecdotally, rather than from hard data. The systems were generally not sophisticated enough to measure results and provide good reporting.

So unions tended to look for the things that were easily measured to envision the effects of training. The simplest measures were recruitment and membership growth. Of those, recruitment is especially problematic because recruitment activity can be at the expense of other things that promote power in the workplace and this measure fails to take account of membership losses that may result from the failure of union power. In some (limited) circumstances, then, measuring recruitment can be counter-productive; at best, it needs to be interpreted cautiously. Membership growth is a far better indicator, as membership is one (but not the only) factor that shapes union power in a workplace, as well as the resources available to the union.

However, membership growth is not really a proxy for activism. To measure this directly, unions need to make greater use of pre- and post-education surveys that enable before-and-after comparisons to be undertaken. The purpose should be not to measure participants' satisfaction with the classroom course itself – this is already done quite well, and the results are generally very positive – but to measure the impact on activism, an ultimate aim of these programs. These should consider attempting to measure such matters as the union success rate in a workplace, the degree of support delegates are able to secure from fellow members at the workplace, both in willingness to put pressure on management (through industrial action if necessary) and in spreading the burden of the delegate's workload, and other indicators that matter to the union. Much of this information is inherently subjective, but systematically collecting subjective data in an objective way is possible and better than relying on the occasional anecdotes or inadequately framed 'objective' data.

The degree of coordination over delegate education and training was a mixed bag. There are inherent problems of coordination between organisers and educators, and unions have found various ways to deal with this issue. We return to that matter later in this section. Between branches or unions, limits may have arisen on coordination from the nature of the union's coverage or political leanings (less an issue now than in the past) or the history of amalgamations that led to their current structures. Cross-union cooperation usually focussed on campaigns, often successfully.

Sharing of training materials or of best practise was less common, partly due to the bespoke nature of some but also due to views about other unions. Whatever the co-operation between unions or union bodies, we found no instances of cooperation or working with other not-for-profits or similar organisations on education and development. Without digging further into this issue, it does seem a bit of a lost opportunity: we know that trained delegates are more active where they have had previous

experience in other community organisations,¹⁶⁶ and where they have networks that extend beyond unions into non-profits.¹⁶⁷ It seems likely that there would be synergies from unions working co-operatively on education and development with other parts of civil society. However, this report is not the place to go into that in more detail.

The biggest, mostly *invisible*, issue was the relationship between union education and development, on the one hand, and the distribution of power within unions, on the other hand. There was occasional talk about distributed leadership models at senior levels, but actioning these was another matter altogether, especially in unions where such issues were not actively considered. Few unions took seriously the challenge of redistributing power within the union, yet that appears vital to union success.¹⁶⁸ Tensions arose around delegates' role within the union and union structures, creating issues for trainers who could observe the contradictions. Effective delegate education and development changes delegates' expectations of the union organisation, from an entity that *fixes* problems to one that *supports* delegates as they go about resolving those problems with their workmates. The union becomes less of a third party service provider, like an insurer, and more of something of which the delegate is actually a part, and in which they demand to have a say. If they don't get that say, they can become disillusioned and disengaged.

The biggest, mostly *visible*, issue, on the other hand, was the critical matter of follow-up. Was there adequate attention being paid to follow-up of training? No. Why? It is not really effective for educators to be the principal actors in follow-up. Yet the demands on organisers time were already excessive. They often (not always) saw follow-up as an additional impost on their time, something that would detract from their ability to do other things, like running campaigns (or even recruiting) that were central to organisers' tasks. Indeed, to the extent that organisers recognised that delegate development was part of their role (which many did recognise), follow-up of training was seen as an add-on that enhanced it. Yet, in reality, follow-up is *central* to delegate development, and hence to the emergence of workplace leaders. If it is not done, the effort put into training is wasted, and unions could have better used those resources elsewhere.

When organisers see follow-up as integral, not additional, to delegate development, then they are in a position to look at their use of time in a different way. Spending time on delegate development without spending time on follow-up is like constructing a large number of half-built cars, rather than a smaller

¹⁶⁶ Peetz et al, Community activists chapter.

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¹⁶⁸ Peetz, D & Pocock, P (2009) An analysis of workplace representatives, union power and democracy in Australia *British Journal of Industrial Relations* 47 (4) pp623-652

number of complete ones: great workmanship may have gone into them all, but unless they can go, they are not much use to anyone.

This is not to say that only organisers should be responsible for follow-up. In at least some unions there is follow-up undertaken by the educator in the classroom itself when the delegate returns for a second or third round of classroom education. This may be useful for checking that the delegate has been able to implement a workplace plan, but that is not really the main benefit of follow-up. It can also be useful for learning how to solve problems when things go wrong. It can enable other delegates to learn lessons about implementation, and that can be very useful. But in the end, the organiser is key to successful follow-up that is most directly relevant to that delegate's workplace situation.

It is no surprise then, that same people spoke to us about the need to allocate more resources to the education and development of organisers themselves. We did not review the education and development of organisers for this project, so we cannot comment on how effective or otherwise it is, but it strikes us that a fully effective delegate education and development program requires active involvement of organisers and hence a clear understanding of their role, the expectations of the role, as well as high-level skills to implement that role. These things don't happen by accident.

As with the allocation of resources to all aspects of delegate development and training, the common refrain on these issues is often that the resources are simply not available. 'Organisers don't have the time.' Aside from the difficulty of recruiting staff mentioned earlier, though, the real issue is the determination of priorities. Failure to prioritise follow-up means that follow-up will not happen. This is a conscious choice of union managers. Without adequate resourcing of delegate education and development, which means without adequate prioritising of follow-up, there will be ongoing mismatches of top-level strategy and on-the-ground implementation.

Existing research shows how essential follow-up by organisers is to prudent use of limited training budgets. When it comes to the lessons from training and education, delegates need to 'use it or lose it'. For a union, it is more effective to allocate sufficient resources to enable all training to incorporate follow-up, than to send lots of delegates through training without any plan for follow-up afterwards. So how can this best be done?

Much depends on the realities facing each union, and so a blanket recommended approach is neither desirable nor feasible. However, aside from incorporating follow-up into planning for training, success probably also requires involvement in some way of organisers in training and education. That does not necessarily mean getting them to sit in on classes, as in some cases that just creates resentment

amongst disengaged organisers. But it does mean engaging organisers in the planning and often presentation of courses. In some cases, it may mean what at least one union calls ‘co-training’.

In the end, there are three things a union should look for from this process:

- ensuring the training is relevant, where appropriate, to what delegates will be doing in the workplace;
- ensuring that organisers make contact with delegates, especially after classroom sessions, and that they do so purposefully, helping delegates learn, on the job and informally, how to apply the lessons from the classroom, and;
- ensuring that delegates also have contact with other delegates, again to reinforce the lessons from the classroom (and also, what they have learned from the organiser).

The phrase ‘where appropriate’ in the first point is important. Not all training *can* be immediately relevant in the workplace or followed up by the organiser in that situation. A course on economics for unionists does not require immediate application or workplace follow-up, and should not be discarded simply because of that. Apart from such exceptional cases, however, consideration should always be given to how lessons from the (physical or virtual) classroom can be followed up and applied in the workplace.

But it is the third dot-point above that probably receives the least attention from unions in the delegate development process and is least considered when it comes to follow-up from formal education and training. When we think of the three aspects of the learning process that one of our organisers referred to – the classroom, on-the-job experience, and interactions – the interactions are so often forgotten about. Certainly, some unions consciously (or incidentally) facilitate networking through delegate conferences or other scheduled events. However, more, it seems, need to be done to develop formal, organised networks of delegates, especially networks extending beyond the workplace, and in some cases beyond their industry. These networks can be crucial in enabling delegates to usefully apply the lessons from their classrooms and from what they have learned from the organiser – and to help other delegates apply those lessons, also. The establishment and nurturing of these networks is something that organisers are critical for, and therefore is something that also needs to be built into the work and education of organisers.

This is not to say that it is our assessment that Australian unions have now all equally recognised the importance of follow-up to training and education courses, and implemented it across their offerings. It is evident that there is great diversity across Australian unions as to how advanced their understanding

and development of follow-up is. The unions whose staff we interviewed, on average, represented a more advanced group of unions than we would likely see from a representative sample of the Australian union population, and even amongst them there was a great diversity of progress.

Whatever unions try, in implementing changes arising from any reviews of follow-up and networking processes, it is important to ensure that such changes are properly monitored and evaluated. There is no single solution, what works for one union may end up quite differently for another, and so continuous improvement is an important aspect of creating effective delegate development programs. There is a key role for inter-union institutions in sharing, supporting and promulgating 'best practise' in all its forms, identifying gaps and directly building skills for some groups.

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