

YOUR TURN!

A **HANDBOOK** FOR
CRITICAL REFLECTION



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A FRAMEWORK FOR EDUCATION TRADE UNION RENEWAL: TOWARDS A TRANSFORMATIVE TRADE UNIONISM

In the research report *Your Turn: Teachers for Trade Union Renewal*¹ (2020) the research team provide a framework for considering issues relating to union renewal (see figure below). The choice of the term 'framework' is deliberate. It is not presented as a plan or blueprint to direct a set of actions. Specific actions will always be shaped by the specific issues that confront union members at any given time. Rather it is intended to offer a way of organising thinking about renewal and structuring the type of conversations necessary to make change happen. It will only have value if it is applied flexibly and creatively by those who seek to use it, above all thinking about how the framework needs to be adapted to reflect individual contexts. Here we provide a set of questions that can support this process of critical reflection. Each of the four dimensions of the framework, **Purposes**, **Processes**, **Actions** and **Evaluation**, are linked to an associated set of questions. The questions are not provided as an exhaustive or prescriptive list but are intended to act as a starting point that in turn will generate more contextually specific questions. Together they may contribute to the development of collective responses grounded in the unique circumstances of individual unions.

It is hoped that these questions may be useful to all those interested in reflecting critically on the work of education trade unions regardless of role. However, in each case it is important to reflect on who is part of the conversation - where do the conversations take place? Who is participating? Perhaps more importantly, who is not participating, or whose voices struggle to be heard? How can the conversations reflect the rich diversity of the organisation's membership, and indeed the wider workforce that the union seeks to represent?

¹ Stevenson H., Carter B., Milner A. and Vega Castillo M. A. (2020). *Your Turn: Teachers for Trade Union Renewal*. Brussels: European Trade Union Committee for Education.



PURPOSES

This involves discussion of 'big questions' that go to the heart of the purpose of an education trade union. Some questions may seem so self-evident that they are not necessary to discuss, but basic purposes need to drive all else and periodically revisiting fundamental questions can help to challenge taken for granted assumptions:

- What do we mean by union renewal? Why 'renew'?
- [More fundamentally . . .] What is the union for?
- What are the values that underpin the union?
- How well does the union reflect the values it is based on?
- Are the purposes and values well reflected in the priorities and actions of the organisation?
- Whose voices may be absent or under-represented in discussions about priorities?
- Where does the union need to be in 5 or 10 years time? What should it 'look like'?

PROCESSES

The framework identifies three 'processes' that emerged in the research as key to supporting and driving change. In each case the table below includes a brief elaboration, followed by a set of linked questions.

Analyse context and develop direction	Questions to consider
<p>The extent to which the union is assessing short, medium and long trends impacting members' work and wider industrial relations issues.</p>	<ul style="list-style-type: none"> • What is the political/economic/societal context? Assessing developments in the political situation, labour market and industrial relations environment? What are the changing demands on education workers? • Where does power lie? (in your organisation, and outside) • Who are your allies? • What are the developments and trends in work and the workplace? • What are the sector specific issues (especially in unions that represent multiple sectors and have diverse membership interests)?
Democratise change	Questions to consider
<p>Ensuring that the organisation is open and accessible to all members and that barriers to participation are tackled.</p>	<ul style="list-style-type: none"> • What is the culture of the organisation? [perceived by activists in the union, members of the union but not 'active' and those not in the union but who are potential members] • What does the union 'look like' at local level? At the national level? At the workplace?
<p>Developing strong unions cannot be separated from participation and democratic engagement.</p>	<ul style="list-style-type: none"> • How easy or difficult is it for members to get involved? What are the barriers to engagement? Are there groups that are under-represented in the union? If so, who are they and what would change that? • How effective are the union's communications channels? How, and to what extent do the union's communications channels support, and encourage, member engagement?

Educate to Transform	Questions to consider
Developing members and activists - providing union building skills and developing strategic and analytical thinking in local union leaders	<ul style="list-style-type: none">· What is the education provision for members and activists in the union? How much education is focused on activist development?· What is the place of political education in the union's education provision?· Who provides education in the union? How are members involved in providing education?· Where is education and training located? How much is organised for branches? By branches?· How does the union support members to become activists and for activists to become leaders?· What does the 'pipeline' to leadership look like and does it reflect the diversity of the membership? How are future leaders identified?

ACTIONS

A key theme of the research is the need for unions to build power in order to be able to bargain effectively, at all levels of the system. In the research report five areas of union action are identified around the general theme of 'organising' (see figure above). These 'organising themes' presented here are deliberately offered in general terms. It is not the aim of this project to identify the specific issues around which individual unions will want to take action - that is rightly the responsibility of individual unions to determine for themselves in the light of local context and members' priorities. Rather the aim is to help unions to think about areas of activity that can contribute to building organisational capacity and union power. These organising themes are best illustrated by referring to the case studies in the final report.

ORGANISING AROUND IDEAS

- What are the 'dominant narratives' about the economy, public services and education? In what ways do these resonate or conflict with union analyses?
- What is the union's 'story' about the key issues in education (at the current time? over the longer term?)
- How well is the union's 'story' understood by union members, by workers in the sector, by 'stakeholders' (parents, students), the public and civil society?
- What actions are adopted by the union to educate members, and others, about the union's key policies?
- How are union members involved in promoting the union's policies, specifically in the form of practical actions?
- In what ways are union activists supported to engage with fellow workers, and others, to win the arguments for union policies? How are education activists supported to be activist educators?

ORGANISING AT THE WORKPLACE

- What does 'workplace organisation' look like to union members?
- How has the union strengthened its workplace organisation and developed workplace leaders?
- How is support for workplace leaders structured to allow workplace representatives to grow confidence and activity?
- How are workplace representatives helped to 'test' member commitment?
- Where is member commitment strong? Where is it weak? What are the strategies for addressing areas of weakness? How were members (existing and new) encouraged and supported to 'step up' to take on local leadership roles in the union?

ORGANISING AROUND WORK

- What are the key concerns of members in terms of control over all aspects of work? What are the key grievances?
- To what extent do grievances reflect different types of union member? (for example, by demographic characteristic or contract type)
- Does a union member believe the union can provide a solution to their grievance?
- Do members see themselves (as a group of union members) as the solution to their grievances - or do they see 'the union' as the solution to their grievances?

ORGANISING THE UNDER-REPRESENTED

- What are the groups in the union that are under-represented?
- To what extent are inequalities in the labour market and society reproduced in the union? How?
- How are groups in the membership who are traditionally under-represented helped to address that inequality?
- To what extent does the union's bargaining agenda reflect the priorities of under-represented groups?
- In what ways can under-represented groups self-organise in the union, and how does self-organisation influence and feed into the whole organisation?

ORGANISE WITH THE COMMUNITY

- Who are the stakeholder and civil society groups that the union works with?
- Who are the stakeholder and civil society groups that the union *could and/or should* work with?
- How has the union worked with allies at a national level to maximise bargaining power and political leverage? How effective are these alliances?
- To what extent are grassroots union members engaged in coalition building with their local community?
- Are activists supported (education and training etc) to build local coalitions?
- What are the issues around which the union works with others?
- What are the issues around which the *could and/or should* work with others?

EVALUATE

In the framework there is a commitment to developing an evidence informed approach to support decision-making and the framework identifies ‘five tests for union renewal’ which can provide an evidence base to evaluate union initiatives and inform future action. At the heart of the five tests is a core question – *to what extent does the initiative contribute to building union capacity, quantitatively and/or qualitatively?*

In the table below the tests are presented combined with suggestions about relevant data and data sources. Some tests clearly lend themselves more easily to measurement, but whatever the data source, it is the care taken with analysis and interpretation that matters. It is understood that there are always costs involved in data collection, but where this is done effectively there is the potential for clear net benefits. Each union must assess for itself what is possible given its own resource levels. The crude use of inappropriate metrics will waste resources and generate poor outcomes.

Does the action build . . .	Possible data source	Data
...membership?	<ul style="list-style-type: none"> Membership data 	<ul style="list-style-type: none"> Membership data and trends, analysed by: <ul style="list-style-type: none"> Demographic characteristics Contracts Sectors Individual workplaces
...identification and commitment?	<ul style="list-style-type: none"> Member surveys (ideally undertaken systematically over time to identify trends) Website data 	<ul style="list-style-type: none"> Perceptions of the union Attitudes to the union Attitudes about priority issues Data analysed by key characteristics (see membership data)

Does the action build . . .	Possible data source	Data
...engagement and participation?	<ul style="list-style-type: none"> · Election returns · Nominations for office · Records of event attendance · Website data · [this type of data is often routinely collected, but not necessarily collated and analysed - a more systematic approach can quickly generate useful data] 	<ul style="list-style-type: none"> · Attendance at meetings · Participation in union elections (number of candidates and members voting) · Number of officers (analysed by demographic characteristics)
...leadership skills and capabilities for organising?	<ul style="list-style-type: none"> · Records of education events · Skills audits of activists · Follow-up evaluations after education and training events (eg 12 months post event) 	<ul style="list-style-type: none"> · Number and type of education events · Attendance data · Skills development · [analysed by demographic characteristics]
...activity and action - in the union and with allies?	<ul style="list-style-type: none"> · Official data (eg strike data) · Unofficial data [it is often relatively easy to integrate 'real time' data generation into union actions to help quantify participation and evaluate success] 	<ul style="list-style-type: none"> · Participation in union campaigns · Participation in industrial action

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