

REPORT ON THE DEVELOPMENT OF A
PROGRAMME OF STUDY FOR JOINT MODELS
OF CO-OPERATION

CENTRE FOR NEWFOUNDLAND STUDIES

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Report on the Development of
a Programme of Study for
Joint Models of Co-Operation

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A research project report submitted to the
School of Graduate Studies
in partial fulfilment of the requirements
for the degree of
Master of Education

Faculty of Education
Memorial University of Newfoundland

August, 2001
St. John's, Newfoundland

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Abstract

The Labourers' International Union of North America (LIUNA) approached The Western Centre for Continuing Studies (WCCS) of The University of Western Ontario (UWO) in March, 2000 to develop and deliver an educational programme to promote the development of new models for joint relationships between labour and management.

The rapidly changing marketplace, fuelled by the emergence of a global economy, has had a dramatic impact on the current industrial landscape. It appears that the economic forces of change in Ontario, coupled with recently introduced government legislation, are influencing some sectors of labour and management to re-assess the nature of their relationship, and to find ways of operating more co-operatively together. LIUNA is a union that has embraced this challenge, and is taking a leadership role in developing and implementing new models for joint relationships (O'Sullivan, 2001).

WCCS worked with LIUNA over the past year to develop an educational programme that will facilitate the development of new models of joint co-operation. The programme will bring together teams of labour and management in a joint learning process to facilitate interest-based planning, decision-making and problem-solving. The programme was developed in consultation with an advisory committee, made up of representatives of both labour and management.

The programme has been designed and developed to provide participants with the knowledge and skills to relate the historical advances made by the labour movement to the emerging need to change again: to develop and apply the skill set required to engage in joint interest-based relationships; and to consider labour and management interests in a global context. The programme is unique and innovative, in that it will focus on joint training between labour and management.

This paper outlines and describes the process of working with LIUNA to develop a programme to meet the needs they had articulated. The project commenced in March, 2000, and it is anticipated that the first offering of the programme will take place in October, 2001.

Personal learning objectives

The development of new and innovative programmes to meet emerging needs identified within the workplace is an important component of the mandate for all university continuing education departments. Generally these new programmes are related to or drawn from areas of expertise within the larger institution, and are designed to share the benefits of the academic knowledge and body of research within the institution with the wider community.

The request by LIUNA to work with them to develop and deliver a program for the development of joint models of co-operation provided an unusual and unique opportunity to research into a new area. While The University of Western Ontario is highly respected as an international leader in the field of management and business education and research, the field of labour relations is not studied or researched in any depth at Western. The opportunity to work with a large international union provided a challenge to explore another aspect of management education, and to identify and call on resources not readily available at Western. In addition, labour relations is an area not previously addressed within the portfolio of The Western Centre for Continuing Studies: the development of a successful program in this area could lead to the emergence of new opportunities and markets for WCCS.

Personal learning objectives for this project included:

- To improve personal knowledge and understanding of the field of labour relations

- To research into the field of labour relations, and identify new approaches to promote co-operation, rather than confrontation
- To work closely with a union to improve understanding of the mandate, mission, vision and values of organised labour
- To explore the potential for developing a new area of expertise and research for The University of Western Ontario
- To improve personal skills and expertise in the area of programme development.

CHAPTER 1 - INTRODUCTION

1.1 Introduction to the project

In March, 2000, the Canadian Tri-Fund Office of the Labourers' International Union of North America (LIUNA) contacted The Western Centre for Continuing Studies (WCCS) at The University of Western Ontario (UWO) to discuss the possibility of establishing a partnership to develop an educational programme to meet an emerging need they had identified. According to LIUNA, significant changes in the economy and the workforce had begun to impact on the trade union movement, and the role of the union was undergoing challenges at various levels. LIUNA sought to identify and implement new models that would enable it to re-define its interaction with management and its membership, and to identify a new direction and mandate for the new century.

According to Marsden (2001), union leaders in today's rapidly changing economic, political, and legal environment must move beyond the traditional notions of effective union leadership to mobilise their membership to participate in new and innovative models of union and management co-operation. The emergence of the new economy over the past thirty years has forced businesses to throw out old rules and operating principles and to develop new paradigms and processes to remain competitive. Many traditional, industrial-based businesses, formerly successful Fortune 500 companies – for instance, International Harvester and Studebaker-Packard - have not survived in the new knowledge-based economy, while the emergence of new technologies has led to the emergence of new industries, businesses and jobs. The challenges facing business in the new economy are not dissimilar to those facing unions –

essentially, the challenge is to maintain market share and viability in an increasingly competitive and changing marketplace.

Herman (1998) identifies some of the key challenges facing union leaders in the new economy. These include:

1. accurate identification of needs
2. planning and implementing innovative strategies that best protect and represent members while encouraging collective bargaining that enhances the mutual interests of all parties
3. participating in informed decision-making and planning
4. participating in creative problem-solving and seeking new ways of looking at old problems
5. recognising and nurturing the potential in others
6. employing skilled mediation and dispute resolution techniques
7. building the organisation and community awareness through strategic planning, organising and marketing
8. building and maintaining effective relationships and partnerships within the union itself and between the union, employer, and the end purchaser of the service or product
9. committing to lifelong learning as a means of developing, changing, and improving the world in which people live and work.

1.2 Problem statement purpose

In preliminary discussions with WCCS, representatives of LIUNA supported the notions expressed by Marsden and Herman, and identified a number of additional key learning needs they considered to be common across unions. These needs include:

1. effective interpersonal and group communication skills
2. negotiation and mediation skills (specifically geared towards understanding opposing perspectives and identifying mutual needs and benefits)
3. developing effective executive boards and organisations
4. developing effective partnerships with various communities, employers, private industry and governments
5. developing problem-solving, decision-making and critical thinking skills aimed at visioning and preparing for the future.

Further to their expressed interest in addressing the learning needs identified above, LIUNA officials indicated that their members are interested in pursuing a university-based credential that addresses these learning needs. They are interested in participating in a non-degree programme of study that addresses these issues in a highly relevant, accessible and flexible manner that brings together current research and theory with expertise and experience from practitioners in the field of labour-management relations.

Specifically, LIUNA representatives expressed a desire to develop this programme in partnership with The University of Western Ontario, an institution recognised as a leader in business education at both national and international levels. *The Financial Times* listed Western in the top twenty business schools in the world in May, 2000, and *Canadian Business* identified Western as the top MBA programme in Canada in October, 2000 (The University of Western

Ontario, 2000). LIUNA feels that incorporating viewpoints and thoughts of respected academics and researchers in current business education will provide a valuable perspective in developing a truly innovative and responsive labour-management educational programme.

CHAPTER 2 – BACKGROUND AND RESEARCH

2.1 *The Labourers' International Union of North America*

The Labourers' International Union of North America (LIUNA) was founded in 1903; it is one of the largest unions in North America, with over 850,000 members currently active, and represents workers in more than fifty different industries. It consists of over 650 local unions, with the largest located in Toronto. LIUNA operates through a tri-fund system, consisting of labour-management co-operatives made up of representatives from management and labour; these individuals work as a team to address the concerns of LIUNA members and the companies who employ them (LIUNA, 2000).

The stated mission of LIUNA is to empower working men and women. Specifically, LIUNA's goals are:

1. to provide a strong voice in the workplace
2. to provide its members with skills training that enables them to meet their full potential
3. to protect its members' health and safety
4. to ensure respect, security and dignity in the workplace.

The goals of LIUNA's training initiatives are (1) to improve the quality of life for its members and (2) to expand the competitive position of the union. Lifelong learning results in lifelong earning (LIUNA, 1997).

In these general principles, LIUNA is similar to most other modern trade unions. However, the nature of the construction industry (which is LIUNA's historical base) is significantly different from most other industries, and has led to the development of different labour-management operating principles and philosophies from those of most other unions.

Skilled tradesmen in the construction industry may work for many different employers during a season, far different from employees of a manufacturing plant, who work for the same employer year-round and who may stay with that one plant for their whole working career. Generally, labourers are hired by an employer for work on a specific job within a specific project: once the project is completed, so is the relationship between employer and employee (LIUNA, 2000).

At a union roundtable organised by The Western Centre for Continuing Studies to discuss the future directions of labour-management relations, LIUNA representatives noted that their union has recognised that it is in the best interests of their members to work co-operatively with construction employers, and to forge a positive union/employer relationship. The benefits of a co-operative approach between union and employers result in more construction projects being awarded to unionised employers, and, consequently, more stable and long-term employment for LIUNA members. Stability and long-term employment also enhance the credibility of the union, enabling them to expand their membership into other areas and industries not directly related to the construction industry.

According to LIUNA (2000a), unions and management have to find new ways of working together if they are to jointly survive and prosper in the twenty-first century. Employers are challenged to find ways of reengineering their businesses to survive in the new global economy. Unions are equally challenged to maintain their current membership and expand into new areas, industries and roles if they are to survive. This viewpoint is supported by Herman (1998), who notes that an increasing number of employers and unions have found out that the best way to compete in the marketplace, securing profits for the employer and good jobs for workers is through co-operative management relations. According to Greenberg, Baron, Sales and Owen (2000), corporate survival in the new economy requires radical organisational change

at all levels, including the nature of the relationship between labour and management. Workers and management share fundamental common goals: there is more to be gained by working in co-operation than by confrontation.

2.2 *The Western Centre for Continuing Studies*

Founded in 1878, The University of Western Ontario is Ontario's third-largest university, with a total student enrolment of over 26,000. Western is a comprehensive university, consisting of 12 faculties and schools offering a wide range of undergraduate and graduate degrees. The University also offers a wide variety of certificate and diploma programmes delivered both on campus and using online technology. Western is recognised as a world leader in diverse areas of education and research. Its Business School, in particular, is renowned as a centre of excellence for management education and is recognised as the leading business school in Canada, consistently ranked in the top twenty business schools internationally.

The University has provided continuing education services for over thirty years, previously through the Faculty of Part-time and Continuing Education, and currently through The Western Centre for Continuing Studies (WCCS). WCCS is the educational bridge between the University and the communities it serves.

WCCS works in the community to identify areas where educational, training, professional development and lifelong learning needs exist. It draws on its close ties to the business and professional community, and the expertise and resources of the academy, to develop and implement innovative and responsive educational solutions to meet these identified needs. In keeping with its mandate to provide current and leading-edge learning opportunities,

the Centre works directly with corporate clients to develop and deliver customised learning programmes that are tailored to the unique needs of the organisation.

The professional staff of the Centre are experts in their field, and bring a wide variety of skills and knowledge to the programmes they develop and implement. Working in a team-based fashion, the Centre recruits additional expert resources from the academic community as required in designing, developing and delivering courses and programmes of an exceptionally high quality.

2.3 Issues to be considered before proceeding

Given the willingness of LIUNA to move forward with this project, WCCS agreed to conduct preliminary research into the field to verify the concepts put forth by LIUNA, and to determine whether there was a market for such a programme. Even though the preliminary request had come from a corporate client, and the request could be accommodated through the development of a customised programme for LIUNA, WCCS felt that it was important to verify the interest of other parties in participating in such a programme. For the programme to be successful, and widely adopted on a national basis by LIUNA, it was essential to confirm that the interest existed at a broader level than the Toronto local, and that the critical elements to be incorporated into a customised programme were common across the country.

Additionally, the Centre is mandated to operate as a business within the University: it is completely self-sufficient, not subsidised by operating funds, and must generate profits on all its programmes for both itself and the University administration. As such, WCCS is prudent in taking on new projects, and conducts research and a business case before proceeding with the development of new programmes. One of the key results to be obtained from the preliminary

research is to determine the profitability of the proposed programme – specifically, is this an untapped market, or is there significant competition at other Ontario universities?

The steps involved in the preliminary analysis and research phase for this particular project at this point included a review of the current issues and status of labour-management relations in Canada, with a specific focus on Ontario, literature review, consultation with experts in the field of labour-management relations, discussions with other unions, and a review of other university-level programmes in Ontario in the field of labour-management relations.

2.4 Labour-management relations in Ontario - Historical overview

The trade union movement was founded out of a need and a determination to improve the position and condition of workers in society; this purpose continues as the primary focus of union activity. Unions emerged in North America in the late eighteenth century first among skilled tradesmen, such as printers and carpenters. Skilled tradesmen held considerable power in their own right, and it was only with the advent of technological change in the workplace and the undermining of the skill basis of their power that they substituted independence for the collective power of a union. Many strikes and lockouts during the first half of the nineteenth century centred on the struggle for control between employers and skilled tradesmen (Marsden, 2001). Unions only began to appear among the most exploited groups of workers, such as mill workers and piece-rate workers, in the second half of the nineteenth century (Reynolds, Masters and Moser, 1998).

Unions were generally organised as local unions of workers in a particular trade group or industry; however, these small local unions were often at the mercy of business conditions, and they could not withstand the closure of a business or a downturn in the economy. Nation-wide unions began to emerge in the latter half of the nineteenth century; they showed much greater

resistance to depression, and eventually took over the functions of the local unions. The strength of nation-wide unions, particularly in the United States, was increased by a change in focus away from politics and towards direct bargaining with employers (Reynolds, Masters and Moser, 1998).

The late-1800's witnessed significant developments in the rise of organised labour in Canada with the appearance of the Knights of Labour in 1875 and the creation of the Trades and Labour Congress of Canada in 1886. The Knights, formed in the United States in the mid-1800's with the goal of uniting all workers, whether skilled or not, advocated united concerns for all workers and a moral and social transformation of industrial society for all workers. Their goals led them into conflict with the established craft unions (such as painters and carpenters), which sought to improve working conditions at individual workplaces, and were not concerned with the rights of women and unskilled workers (Marsden, 2001).

The Trades and Labour Congress of Canada (TLC) – the forerunner of the Canadian Labour Congress - was formed to address labour-related issues, such as hours of work and immigration policies: it remained Canada's major labour confederation until its merger with the Canadian Congress of Labour in 1956. According to Peirce (2000), the TLC provided a forum for rivalry and conflict between the crafts (skilled workers) and industry (unskilled workers supported by the Knights of Labour). In 1902, at the Berlin (Ontario) Convention, the TLC refused to recognise the existence of more than one chartered body in any city or town, and effectively expelled one-fifth of its membership - the industrial unions supported by the Knights. The split between the crafts and industry led to the emergence of more radical unionism in Canada following the Berlin Convention.

The first decades of the twentieth century witnessed increasing labour strikes, as well as a rise in union membership. The rising prices and labour shortages of World War I, in particular, led to increased unionism and strike activity. The effects of the Russian Revolution in 1917 were felt in Canada as they were around the world, with the emergence of more radical views on the rights of workers: the Winnipeg General Strike of 1919 was indicative of the wave of radicalism sweeping the labour movement (Peirce, 2000).

Peirce also notes that, in addition to the rise of nation-wide unions (and increasing membership in American national unions), an important political development in the history of labour relations in Canada occurred in the mid-1930's with the emergence of the Co-Operative Commonwealth Federation (CCF). The CCF gained increasing union and popular support over the years, until it finally became a threat to both established political parties in Canada. The CCF was redeveloped into the New Democratic Party in the early 1960's, and eventually went on to win the government of Ontario in the early 1990's.

Prior to the 1930's, unions were generally seen as subversive, a threat to entrepreneurship and profitability, and, in general, were frowned upon by society and the courts. Trade unions were generally dealt with in the courts, as they were seen to be a threat to society's wants and needs. The Great Depression of the 1930's led to the emergence of unions as legitimate and forceful organisations. Given a 25% unemployment rate and a 30% decrease in gross national product during the Great Depression, public opinion shifted away from big business and the free enterprise system towards trade unionism and employee rights (Noe, Hollenbeck, Gerhart and Wright, 2000). Recognising that the economy was in crisis, and that people had lost confidence in the free enterprise system, the government of the United States enacted legislation to deal with the resolution of labour disputes. The Wagner Act of 1935 finally gave recognition to trade

unions as an integral part of society. With the outbreak of the Second World War, governments had to work with the unions to ensure that manufacturing plants worked at full capacity; ultimately, they had to accept that unions were, and would continue to be, a part of society (Marsden, 2001).

Bill PC-1003, passed by the federal government in 1944 under the War Measures Act, was similar to the Wagner Act, in that it recognised trade unions as the legitimate bargaining agent for employees, and regulated such things as unfair labour practices. This act also allowed for the establishment of a tribunal to deal with matters arising out of the collective bargaining process, including certification. The legislation regulated the peaceful settlement of disputes between collective agreement negotiations, and provided the parties with a mechanism for dispute resolution known as arbitration, which continues to this day. All Canadian provinces adopted similar legislation (Marsden, 2001).

According to Reynolds *et al.* (1998), the rise, power and influence of the union movement was particularly strong between 1950 and 1980, when the engine of the economy was the production of goods and materials by factory-employed workers. By the mid-1960's, unions had become established in all sectors of the workforce, including the public sector, and large international unions, with extensive wealth, membership and power emerged.

Labour-management relations in Ontario – Current status

Currently, private sector union-management relations in Ontario are covered by the Ontario Labour Relations Act, first passed in 1948, and then re-enacted in 1950. The re-enactment of the Act established the Labour Relations Board, and subsequent revisions have moved the parties to a slightly more co-operative and democratic workplace. The current Section 2 of the Act states that the purposes of the Act include: the promotion of collective

bargaining between union and management: committing both parties to embracing workplace change: the promotion of productivity, flexibility and employee involvement: the encouragement of communications between employer and employees: recognition of the importance of economic growth, which is beneficial to the employees, the employer, and the trade union: the encouragement of co-operative participation of employees and the union in resolving workplace issues: and the promotion of the expeditious resolution of workplace disputes (Ministry of Labour, 1995).

This same legislation sets up an adversarial system which appears to be counter to its purpose: it establishes that trade unions have the right to strike and withdraw their services, imposing economic hardship on the employer and the employees (Ministry of Labour, 1995). It also provides for arbitration, which is a final and binding dispute resolution mechanism. According to A.G. Mercer (personal communication, April 22, 2000), this arbitration system is built on an adversarial approach, in that there must be a winner and a loser.

Parties have recognised that the adversarial system has not produced desired results, and some employers and trade unions have attempted to move beyond the adversarial system outlined in the legislation to a more co-operative approach. A number of alternative dispute resolution (ADR) models have arisen in recent years: these include interest-based bargaining (IBB), pre-arbitration mediation, and, in some cases, a joint acceptance of employee ownership and resolution of workplace issues (A.G. Mercer, 2000). The move to interest-based bargaining (also referred to as win-win, needs-based, mutual gains or integrative bargaining) has come about primarily as a means of reducing costly strikes and lockouts, and also as a means of improving the quality of workplace relations after negotiations have been included (Chaykowski, 2001). Based on the "Harvard Model" developed by Fisher and Ury, interest-based bargaining shifts the

focus from positions to interests, and away from people to problems: it encourages the development of options and agreements based on objective criteria. However, Chaykowski cautions that interest-based bargaining is not always successful and has inherent limitations, primarily related to the relative power of the parties and the context of negotiations. One of the keys to successful implementation of interest-based approaches is the willingness of the parties to focus on joint interests and to operate on principles of trust and objectivity.

At a union roundtable held in Toronto on April 26, 2000, some unions, such as the Canadian Media Guild, the Canadian Energy and Paperworkers Union, and the United Steelworkers of America, indicated that they have embraced change in varying degrees, and have in fact integrated interest-based approaches into aspects of their relationships with management. However, other unions at the same roundtable session, such as the Canadian Auto Workers, indicated that they remain committed to maintaining the traditional confrontational and adversarial approach to labour-management relations (roundtable meeting, April 26, 2000).

The emergence of the new knowledge economy in the late twentieth century has led to the development of an economy powered by information, knowledge and service. Economies are no longer protected by national boundaries which served the Industrial Age well; the development of technology has led to an increasingly competitive, global and wired marketplace. The development of a new economic structure has led to the loss of thousands of jobs and the collapse of old industrial-based businesses which were unable or unwilling to adapt to changing models of business; at the same time, thousands of new jobs, new types of works and new businesses have been created (DeCenzo, 1997). The union movement has been significantly impacted by the radical changes that are affecting the economy, and the role of the union is being challenged (Murray, 2001). Unions are facing many of the same challenges as business:

competition for market share, as indicated through membership and sectoral and political influence, is significant. Many unions, in an effort to increase their membership, broaden their power base, and reduce competition from other unions, have expanded their recruitment activities into new sectors outside their traditional industries (Chaykowski, 2001). The Canadian Auto Workers (CAW), for instance, now represents workers in such varied sectors as food and beverage, hospitality, fisheries, and airlines. The total CAW membership in its traditional power base, the auto industry, today makes up only 39% of the total membership (CAW, 2001).

An additional cause for concern by the Canadian labour movement is the recent trend in the United States away from unionised workplaces, and the slight but steady drop in union membership in Canada. According to Murray (2001), union representation of the labour force in the United States has fallen from approximately thirty percent in 1971 to less than fourteen percent in 1999. By contrast, in Canada, approximately thirty-two percent of the workforce is unionised in 1999; this is actually the same percentage of the workforce as in 1971. However, the percentage of the Canadian workforce that is unionised has dropped, and continues to drop slightly on an annual basis, from its highest rate of 37.7% in 1986. Given the dominance of the United States in the global economy, coupled with the implications of free trade agreements, the trend away from unionisation is significant for unions in Canada.

Labour-management relations in Ontario – Bill 139

Bill 139, The Labour Relations Amendment Act, was given royal assent in December, 2000. For several years prior to the passing of this act, which amends the Ontario Labour Relations Act of 1995, the Ontario government had promoted 'workplace democracy', and had attempted to pass a variety of changes to the various acts governing the workplace. These changes had been met with resistance from both labour and management, but more specifically

by labour. In November, 2000 the provincial government, having achieved a majority in the recent election, decided to push forward on their agenda regarding workplace democracy. A 'Red Tape' commission was established to receive submissions on workplace issues from all areas of society, including employers, employees, unions and the general public. Based on these submissions, the government enacted Bill 139.

Bill 139 allows the employer to post ways of decertifying from a union. Many unions see the bill as a threat to their existence in the workplace, and have rejected it outright (Ontario Pipe Trades Council, 2000). According to Sack, Goldblatt and Mitchell (2000), this legislation does not promote or allow the employer or the union to promote ways of joining a union in non-union environments. The labour movement therefore sees this legislation as one-sided in favour of the employer and a threat to unionised workplaces in Ontario. The government's response to these charges has been that all members of society, including unions, have the right to make submissions to the red tape commission, and that failure to do so implies compliance and acceptance (Ministry of Labour, 2000). It is against this backdrop that the government enacted the legislation.

LIUNA contends, though, that Bill 139, in fact, challenges unions to justify their worth in society and their value to each individual workplace. This bill challenges unions to find acceptance within each workplace, unionised or not, and within society as a whole. Unions must identify a different model and philosophy to become more accepted within the workplace, and within society at large. Bill 139 presents both a threat and an opportunity to unions to redefine themselves and their value for the future. The legislation challenges unions to examine their traditional adversarial and confrontational role; equally, it will challenge governments to examine the legislation that enshrines confrontation as new models emerge. Governments will

be challenged to assist in accomplishing this goal by removing legislative supports for the confrontational approach: this ties in to the whole question of relationships.

Bill 139 has potential for all parties in the workplace – employees, employers, unions and government - to analyse and re-define their relationships. The legislation has the potential to force all the parties together to identify and legitimise their roles; it also opens the door to new collaborative and interest-based approaches which may reduce and eventually replace confrontational and adversarial approaches to labour-management relations.

2.5 *Literature review*

While much of the current literature in the field of labour-management relations relates to the traditional adversarial relationship between union and employers, several writers and researchers describe attempts to move forward in developing new models of collaboration and co-operation.

According to Wagar (1997), there is a growing call for more co-operative relationships between labour and management as a means of increasing productivity and enhancing Canada's competitive position in the global economy. There is evidence that company performance is better in organisations where the overt labour-management relationship is more co-operative, rather than adversarial. From a union perspective, there is a growing concern that the adversarial approach to labour relations will result in a decreased ability on the part of business to remain competitive in the global economy. At the same time, there is also scepticism on the part of some labour leaders as to the legitimacy of and motivation for co-operative programmes. Wagar goes on to note that developing a co-operative labour-management relationship is extremely difficult, and requires a long-term commitment from both sides, the development of a trusting relationship, and consistency in dealing with the other side.

Clarke and Haiven (1999) note that collaborative relationships require a combination of changes in work organisation and in the bargaining relationship between management and union. These changes involve implementation of high performance work systems, sharing of power and responsibility between union and management, and a focus on shared goals and problem-solving. There is controversy over whether partnerships are good for unions and should be pursued; however, there is also great potential for unions to improve the working lives of their members through harnessing the potential of joint partnerships. According to Clarke and Haiven, the choice facing unions is whether to be proactive through initiating change as an equal partner, or reactive by resorting to traditional and adversarial means for accomplishing their goals, though often not those of independent worker interests.

Murray (2001) notes that, traditionally, union membership has required that individual members forego their individual prerogatives in favour of democratically agreed-upon collective goals and objectives. A natural tension exists between collectivism and democracy, and, as a result, there are individuals who perceive that they have little say or control in the direction that the union takes, or, ultimately in the relationship between the union and management. According to Havlovic, Kroll, and Bushe (1993), co-operative programmes between labour and management can empower work groups and lead to more effective decision-making. Co-operative programmes can positively impact the autonomy of the individual worker and the effectiveness of the group, and can improve individual worker satisfaction. They argue that, given the strong relationship between work group effectiveness and worker satisfaction, unions should explore new co-operative approaches to workplace relations that give workers more autonomy and control in participatory decision-making and, ultimately, the relationship that develops and exists between the union and the employer. Such changes in basic workplace

relations and functioning may ultimately result in the redefining of individual roles and responsibilities within the union structure: for instance, the role of a shop steward may evolve into a team leader, rather than on their current role of handling members' grievances. According to Fossum (1999), stewards gain and maintain their power through their ability to gain results and to solve workplace problems jointly with supervisors. It would seem a natural progression in a more co-operative workplace relationship for the role of union steward to take on a new focus.

Verma and Gottlieb Taras (2001) argue, though, that increased employee involvement in the workplace presents significant challenges, requiring all parties in the employment relationship to fundamentally alter their traditional attitudes and approaches to each other. However, increasing expectations of employees and competitive pressures from the marketplace will continue to ultimately force labour and management to devise and implement better ways of improving workplace relations through greater employee involvement and co-operation.

Smith (1993) notes that increased international competition has produced new initiatives for new approaches to industrial relations. There is a significant trend in the workplace towards human resource management and away from the adversarial approach to industrial relations. There is an increased awareness at many levels of the need to bring about change in traditional labour-management relations, often characterised by mutual distrust and frequent conflict, towards more co-operative and collaborative relationships.

Wagar (1997) supports this stand. There are increased demands for more co-operative relationships between labour and management as a means of increasing productivity and enhancing Canada's competitive position in the global economy. Wagar notes that some organisations, both labour and management, are moving away from the traditional adversarial approach to collective bargaining as a means of responding to the fundamental economic and

technological changes that are challenging businesses at every level today. Noe *et al.* (2000) point to structural changes in the economy, increased employee resistance, improved government regulations, and an increasing philosophical change to a less confrontational policy of human resource management as indicators that there are opportunities to move forward with developing and implementing new models of collaboration and co-operation.

Marsden (2001) argues that the question for the future is how organised labour will adapt to the forces of change that are restructuring the economy. Unions have historically adapted to profound economic and social transformation in the past; today's economic system will require further adaptation by collective labour. Marsden asserts that unions will have to adapt in their fundamental philosophies and approaches to appeal to workers of the twenty-first century, not the twentieth, if they are to remain relevant and vital, and to continue to exist.

2.6 *Consultation with management practitioners*

According to A.G. Mercer¹ (personal communication, April 22, 2000), unions and management must find new ways of working co-operatively if they are to survive. The competitive and global business climate of the late twentieth and early twenty-first centuries requires businesses to operate efficiently and effectively at all levels of the organisation: this cannot happen if labour and management are working from a traditional confrontational model, whereby one party must win and the other must lose. Alternative dispute resolution models, while valuable and effective, are nevertheless a means of solving a dispute: a far better option, according to Mercer, is to define a new model for working co-operatively to *prevent* disputes, and the costs they exert on the company, the union, and the workers.

¹ A.G. Mercer is the Director of Faculty Relations at The University of Western Ontario, and the former Director of Industrial Relations with the Canadian Broadcasting Corporation and Canada Post

Mercer goes on to say that many businesses have searched for and implemented methods of operation that exclude or work around unions. One example of this is contracting out, whereby work is sent outside the company to be completed by self-employed individuals, sub-contractors, or plants in third world countries which have little or no legislation governing the wages or rights of workers. The loss of these previously unionised jobs, together with their membership dues, is of significant concern to unions. Unions in the twenty-first century function as big business, and decreases in their revenues and memberships will have severe impacts on their long-term profitability.

Mercer asserts that unions are challenged today to defend their purpose and credibility. While acknowledging the historical value of the trade union movement, many individuals and groups see unions as outdated, redundant, confrontational and non-productive institutions which are no longer useful. If unions are to survive into the twenty-first century in this environment, they must re-define their purpose and mission, and identify new mandates and operating principles. According to Mercer, LIUNA has identified an opportunity to establish itself as a leader in developing new models and paradigms for unions in the twenty-first century.

Mercer's viewpoint was confirmed in a subsequent conversation with the Vice-President of Labour Relations of a Fortune 500 company located in London, Ontario.² This individual stated that unionised businesses will not survive unless they find new ways of working collaboratively with their unions. The onus to identify and implement new collaborative models is a tri-partite one: union, management, and employees must all share the responsibility of learning to work more effectively together from a non-confrontational standpoint. The

² This individual requested that he not be identified at this time in this paper, as the company is currently in negotiations with its union.

development of new and improved joint working relationships has become a priority for this company. While management and labour, in general, operate harmoniously, the company wants the union, and its individual members, to understand the nature of their relationship, and their interdependence in maintaining success and profitability. Increased global competition and the impact of new and improved technology require that this organisation and its union find ways to work more effectively and co-operatively.

2.7 *Discussions with other unions - Roundtable meeting*

Given that preliminary research indicated a gap in the field of labour-management relations – specifically, there are currently no joint training programmes offered in Ontario that (1) focus on developing and sustaining models of labour-management co-operation, and (2) provide university credit for a non-credit programme - and that a strong interest had been expressed in discussing the development of a new and innovative approach to education in this field, The Western Centre for Continuing Studies convened a roundtable of key players in the union movement in Toronto on 26th April, 2000. Stakeholders invited to the roundtable included:

- Canadian Labour Congress
- Ontario Federation of Labour
- Canadian Union of Public Employees
- Canadian Auto Workers
- Teamsters Union
- London and District Labour Council
- United Steelworkers of America
- Communication, Energy and Paperworkers Union

- Ontario Public Service Employees Union
- United Food and Commercial Workers
- LIUNA.

A discussion paper was presented in advance to all invited participants. The purpose of the discussion paper was to articulate the key concepts and needs proposed by LIUNA in its preliminary discussions with WCCS, and to present for discussion the key elements of a proposed educational programme developed to meet those needs.

The outcome of the discussions revealed differing needs and beliefs about the focus of an educational programme for developing new models of labour-management co-operation. All participants agreed that there was a great need for new and innovative educational programmes in the field of labour-management relations; however, there were significant differences between unions and the rationale for developing such programmes.

Some representatives felt that the needs of unions could only be met through a programme that supported the development and enhancement of skills applicable to the traditional confrontational approach to labour relations, but developed specifically for each union. Others supported the notion of developing a joint union-management educational programme that would explore different methods of achieving co-operation between labour and management, with the specific goal of enhancing work, life and industry success for all parties.

Other points of interest that emerged from the discussion included the need for the development of university-based programmes that would bridge workers from non-credit union and university programmes into degree-credit programmes, incorporating online and/or alternative delivery methods. It was also noted that undergraduate business school students would benefit from participating in such programmes in helping them to understand the union

movement and the realities of working life. One union expressed the opinion that education for and about unions is best delivered by unions themselves, rather than by universities.

It was apparent during this roundtable that there were different 'camps' among the various unions represented, with those advocating the continuation of the traditionalist approach strongly opposed to those advocating changing the relationship between labour and management to one based on co-operation and collaboration.

Discussions with other unions - Next steps

Given the wide range of opinions articulated, but also that the notion of developing an educational programme for exploring joint models of labour-management co-operation had been supported by a number of other unions at the roundtable, WCCS agreed to continue to work with LIUNA in investigating the development of a programme that would meet their goals. The programme, although customised, would be applicable and beneficial to other unions and to management. Other unions who had expressed an interest in such a programme would be kept informed of developments, and given the opportunity to provide input and participate in the final programme. A follow-up meeting was scheduled with LIUNA for June, 2000.

2.8 Review of labour-management programmes offered by other Ontario universities

In order to ensure that the proposed programme would indeed be unique and innovative, and not in competition with other programmes, WCCS conducted a survey of other universities in southern Ontario to determine their current offerings in the field of labour relations. While other universities in Ontario offer a variety of programmes focussed on the areas of industrial relations and labour relations, it appears that none offers a programme focussed on joint training between labour and management. Table 1 provides an overview of the programmes offered at six Ontario universities.

Table 1 – Labour-management programmes offered at Ontario universities

University	Undergraduate degree	Graduate degree	Specialised programme	Notes	Joint programme
Carleton University	Concentration within Bachelor of Commerce	Concentration within MBA degree	No		No
MacMaster University – Centre for Labour Studies	Bachelor in Labour Studies	Masters in Work and Society	Certificate in Labour Studies	Certificate offered in partnership with the Canadian Auto Workers	No
Queens University – Centre for Industrial Relations	No	Masters of Industrial Relations	Non-credit continuing education courses		Some - but courses do not provide university credit
University of Toronto <i>Centre for Industrial Relations</i>	No	Masters of Industrial Relations Ph. D. in Industrial Relations	No		No
University of Toronto <i>Rotman School of Management</i>	No	No	No	Advanced Programme in Human Resource Management	No
University of Toronto <i>Economics Department</i>	Concentration within Economics	No	No		No
University of Windsor	Bachelor in Business Administration with concentration in Management and Labour Studies	No	Non-credit courses in ADR		No
York University	Bachelor of Arts in Labour Studies	No	No		No

2.9 *Follow-up with LIUNA*

In developing any new programme of study, it is vital to have input from key stakeholders. The first step in the process is to confirm that the need exists, and the second to identify the critical elements that must be addressed through an educational programme. This information is then used to articulate overall goals and design a curriculum for the programme.

Follow-up with LIUNA - Survey

The WCCS consulted with business directors of all LIUNA locals across Canada, and asked them to complete a survey to ascertain: (1) the broad need for the development of a programme of study in labour-management co-operation and (2), if there was a need, what the critical elements of such a programme should be. The survey was sent to 36 LIUNA business agents and organisers across the country, representing all 10 provinces: 21 responses (58% of the total distributed) were received. Using a rating scale from "Not important" to "Very important", respondents were asked to comment on the need and value for the proposed programme, and on each of the key elements identified above.

The results of the survey confirmed both the need and interest in the proposed programme, as well as the accuracy of the elements (a copy of the survey, together with a summary of the results is attached at Appendix "A"). The results were incorporated into a discussion paper, together with a proposed list of critical elements or tasks that should be incorporated into the development of a proposed educational programme. The paper was prepared and presented to LIUNA in late May, 2000, and discussed at a follow-up meeting on 18th June.

Follow-up with LIUNA – Articulation of problem

The challenges facing the rapidly changing marketplace confirm the need for both labour and management to reassess the nature of their relationship. Deregulation, global competition, new and emerging technologies, and the challenge of attracting and maintaining a highly skilled workforce have had a dramatic impact on the industrial landscape (Robbins and Langton, 2001).

There are significant mutual interests and benefits for both labour and management in finding creative and co-operative ways to remain productive and competitive in the new economic environment of the early twenty-first century. The cost of disputes and adversarial relationships to both unions and employers is significant: any disruption to the flow of work in today's competitive and global marketplace can have serious and long-lasting implications to an organisation's market share. The issue is equally significant for both parties, as the success of a union in bargaining for its members is directly related to the profitability of the employer (Marsden, 2001).

It appears that labour and management have an opportunity to move forward jointly to ensure productivity and competitiveness by discovering common goals. By working collaboratively and co-operatively on these goals, they can more effectively enable: industry growth and market share; job security, fair compensation and improved work-life for workers; a highly skilled workforce; quality services and products; loyalty and trust between union, management and workers; and a joint strategy and vision for the future. The key to achieving these objectives and improving labour-management relations, according to the Canadian Labour and Business Centre (2000), is the development of communications and trust between the parties.

New methods of working together offer significant opportunities for all parties: LIUNA has identified this, and can capitalise on this opportunity. Specifically, there are opportunities for improving communications between all parties: providing workers and employers with opportunities to study and explore new and innovative joint approaches to achieving organisational effectiveness: assisting workers and employers in solving problems of mutual concern not susceptible to resolution within the collective bargaining process: and studying and exploring ways of increasing productivity. Additionally, new models of co-operation can enhance the involvement of workers in making decisions that affect their working lives: encourage collective bargaining through an interest-based approach: promote the use of safe, efficient, high quality services and procedures: and foster the development of skills and high quality training. However, according to Mercer (personal communication, May 12, 2000), effectively facilitating labour-management co-operation can be an enormous challenge, given the current environmental strains and the historical adversity often shared by labour and management.

Based on its preliminary research, the Western Centre for Continuing Studies identified a number of key elements for discussion as potential for inclusion in the proposed programme. These elements included:

- Establishing an orientation to the history of labour-management relations, and specifically to joint activities
- Assessing readiness for collaborative activity between labour and management
- Change processes that influence the move toward co-operative activities
- Joint strategic planning between labour and management
- Adult learning approaches and techniques

- Team-based group process skills
- Training for facilitators and coaches
- Interest-based bargaining
- Partnership issues

The WCCS confirmed its willingness and ability to develop, in partnership with LIUNA, a customised programme that would focus on joint labour-management training.

2.10 Advisory committee

In November, 2000, the Western Centre for Continuing Studies presented a draft proposal for a Programme in Joint Labour-Management Co-operation (working title only). The proposal articulated the results of the research conducted to date, as well as the input and feedback received from LIUNA, and put forward a proposed curriculum. WCCS recommended the formation of an advisory committee to guide the development of the programme, and further recommended that the committee include representatives of both labour and management, in addition to representatives with expertise in labour-management relations. Management representation was provided by representatives of LIUNA's signatory employers: these include large general construction companies as well as consortia of companies that specialise in specific areas of the construction industry, such as pipeline construction.

The advisory committee met via email initially, and then face to face. The draft proposal was reviewed and critiqued, and met with overall support and approval of the committee, with minor changes to the priority and sequence of various sub-topics.

CHAPTER 3 - PROGRAMME DEVELOPMENT

3.1 Analysis

Problem analysis

As the new economy continues to evolve and challenge organisations to discover new ways of operating in order to remain competitive, labour and management are equally challenged to find and implement new models of working more co-operatively. The traditional adversarial relationship between labour and management can lead to huge problems and costs in today's rapidly changing work context. Antagonistic relationships between unions and employers result in reduced productivity, work stoppages, costly grievances and arbitrations, and protracted bargaining sessions, and reduce the ability of the employer to be profitable in today's competitive marketplace (Noe *et al.*, 2000).

LIUNA, although a strong international union with a history steeped in the traditional union model, has a somewhat different relationship with management. As noted above, LIUNA members may work for a number of different employers throughout the year, depending on the work available and the scope and duration of individual projects. Since work for its members is intricately interwoven with the ability of employers to obtain contracts, it is in the best interests of LIUNA to work co-operatively with management in obtaining work contracts. An antagonistic relationship, built on traditional confrontational approaches to unionism, inhibits the ability of contractors to obtain work and LIUNA members to obtain steady incomes. A more collaborative, co-operative relationship is more conducive to obtaining the types of results that LIUNA wants to achieve (LIUNA, 2000a).

LIUNA acknowledges that identifying, developing and implementing new models of co-operation that will foster closer collaboration between labour and management is not an easy task, and is not widely supported by other traditionalist unions (Wagar, 1997). LIUNA sees education and training as the keys to bringing about this radical change, and has approached The Western Centre for Continuing Studies to design and develop an educational programme that will assist in meeting these goals. LIUNA also sees an opportunity to establish itself as a leader in the emerging field of labour-management co-operation, and in identifying new roles for unions as the economy dictates the emergence of new paradigms for labour and management in the twenty-first century.

3.2 *Needs assessment*

Scope of needs assessment

A needs assessment assists in finding out whether instruction should be designed, clarification of the problem, and the selection of an appropriate intervention (Smith and Ragan, 1999). As much of the front-end analysis for this project had already been conducted during the preliminary research phase with LIUNA, and WCCS had already determined that there was indeed a business case for proceeding with the development of the programme, the needs assessment for this particular project was conducted primarily to list the instructional goals to be incorporated, the gaps between 'what is' and 'what should be,' and the priorities for the instructional goals.

As this programme was designed specifically for LIUNA, the needs assessment was conducted primarily within their organisation, both at a local and a national level. The key contacts were business managers, organisers and members of the local executive. However, input

was also solicited from an advisory committee, which consisted of representatives from both management and labour and experts in the field of labour relations

Categories of information for needs assessment

The needs assessment gathered the following information from local LIUNA executive members, business agents, and organisers across the country:

- the current level of understanding of labour-management relations
- the current operating procedures for labour-management interaction at LIUNA
- the understanding of the need to develop more co-operative models for labour-management interaction
- the skills required to function in a more co-operative fashion.

Methods of data collection for needs assessment

Data was collected through:

- Interviews
- Survey of LIUNA business managers across Canada
- Literature review

Sources for data gathering for needs assessment

The following sources provided input and information:

- LIUNA executive members
- LIUNA business managers
- The advisory committee (consisting of representatives of labour and management)
- Faculty members, UWO

3.3 *Goals and objectives*

The information gathered through the needs analysis identified the following broad-based goals for developing and implementing collaborative and interest-based approaches:

1. To improve the relationship between labour and management
2. To improve job security, compensation, and quality of work life
3. To engage labour and management in identifying and developing new paradigms for success in the new economy
4. To develop a highly skilled workforce
5. To improve and promote loyalty and trust between unions, workers and employers.

Specifically, new methods of working more collaboratively and co-operatively offer opportunities for:

1. Improving communications between labour and management
2. Assisting workers and employers in solving problems without resorting to grievance activity or the collective bargaining process
3. Identifying and implementing ways of increasing productivity and profitability, and reducing problems and conflicts which lower competitiveness and inhibit industry development
4. Improving the ability of workers to effectively participate in making decisions that affect their working lives
5. Encouraging the development of innovative approaches to collective bargaining that are interest-based and win-win
6. Identifying and implementing ongoing strategies for dealing with change

3.4 *Performance analysis*

Current situation

LIUNA members are strongly urged and are financially supported to participate in lifelong education and training. LIUNA has a strong international training arm, and actively encourages its members to participate in job-related skills training and other educational pursuits to improve their overall quality of life. Local executive members participate regularly in union-based training which is focused specifically on providing current information on the various aspects of running a union, including collective bargaining, grievance procedures, and conflict resolution.

The nature of the core business of labourers (primarily the construction industry) has promoted a co-operative spirit between LIUNA members and employers. However, LIUNA wants to promote the development of more sophisticated and complex co-operation between workers, employers and union, and, ultimately, define a new role for unions in the twenty-first century. LIUNA sees itself as a pioneer in developing new relationships between employers and unions, one that moves away from confrontational and adversarial approaches to joint co-operation, planning and collaboration.

Current LIUNA education and training initiatives generally take place in a strictly union setting in isolation from LIUNA employers. While this model ensures that LIUNA members are well-trained, informed, and current, it also entrenches the 'us and them' mentality that is characteristic of the traditional approach to labour-management relations. The same situation is generally true of employers: while they participate in training, lifelong learning and professional development, they do so in a venue that generally does not include the unions they interact with on a daily basis.

Desired situation

As the new economy continues to force businesses to rethink and re-invent the way they operate, and leads to the demise of those businesses that cannot adapt to changing paradigms, unions have to re-examine their mandates, philosophies and operating principles if they are to continue to be a vital and vibrant force in the economy. Confrontational and combative approaches to labour relations are costly to employers and unions equally. Employers are finding new ways to work without unions, and unions are experiencing not only declining memberships but also challenges to their very existence (Marsden, 2001).

The desired situation is one in which LIUNA members and employers jointly develop and implement new models of co-operation. This would involve developing a shared vision and plan for the future, an understanding of team-based approaches, improved communications, and a shared approach to establishing and achieving goals. This new co-operative approach to labour-management relations would result from new ways of thinking and acting, and would result in not only a new type of relationship, but, ultimately, the emergence of new roles for both employers and unions.

Proposed solution

The Western Centre for Continuing Studies proposes an instructional solution to this issue. Union members and employers tend to operate in isolation until they have to enter into dispute resolution or collective bargaining. While ultimately union, workers and management benefit and prosper from working harmoniously and achieving profitability, their goals, philosophies, and operating principles are not always aligned.

Knowledge and skills for developing techniques and joint models for co-operation can be learned. Their development involves focussed and practical instruction which ultimately will

empower unions and employers together to derive new and enhanced benefits. The key to the success of such a programme, though, is that employers and union members must participate together, and develop the model jointly. Since the deficiency is one of skills and knowledge, an instructional solution is appropriate.

3.5 *Contextual analysis*

Learner characteristics

Union members are professionals and workers who bring a variety of backgrounds, education, and experience to their work. Most LIUNA members are skilled tradesmen, and continually participate in union-sponsored training and education to upgrade their skills and remain employable. They work in a variety of trades and professions, including the construction industry and healthcare. While they are skilled workers, they have not necessarily completed a high level of formal education. Many of them have never attended university, and have expressed concerns to their union leaders about their ability to learn in the formal environment that they anticipate a university would entail (LIUNA, 2000c).

LIUNA executive members have been elected by the union membership to represent their interests in regular workplace activities, to run the union's affairs, to formulate policies, plans and strategies for union and worker success and effectiveness, and to lobby on behalf of the membership with employers and government. While they have similar backgrounds to the workers whom they represent, they participate in continuous education and learning opportunities sponsored by the union. Some of them have gone on to complete post-secondary education, including university degrees.

Employers run the same educational gamut as the LIUNA workers they hire. Many owners and managers of unionised construction companies describe themselves as 'self-made'.

with little or no formal education. At the other end of the employer spectrum are individuals with professional and post-graduate degrees and credentials in disciplines such as engineering and business. Many of them regularly participate in professional development and training, sponsored by the professional organisations to which they belong or by government agencies.

The learners in this programme will be diverse in personal and social characteristics, learning styles, and socio-economic backgrounds; however, they are all adult learners. While lifelong learning and professional development are widely endorsed, supported, and participated in by LIUNA members, union officials and employers, there is some hesitancy about their comfort level in a university environment. They are generally individuals who 'learn by doing' – they work with their hands, and are comfortable learning in an environment that simulates the workplace. Therefore, it will be essential to incorporate adult learning philosophies, principles and techniques in designing the instruction. The programme should be focussed on learning activities that are meaningful, experiential, self-directed and learner-centred.

Ideally, participants will be 'matched pairs' -- labour and management representatives who interact closely on projects, or who come from the same organisation, and will have some level of practical experience in participating in the collective bargaining and/or negotiation process.

Instructional setting

Participants in this programme will be selected from individuals who have expressed an interest in developing new models of joint co-operation between labour and management. LIUNA has specified that the instruction must be focused on practical and applied skills, grounded in theory, so that participants will be able to implement new skills and knowledge in

the workplace. The key to the success of the programme, as noted above, is that union and management will participate together: therefore, there should be a balance between employers and workers. LIUNA will select individuals from its membership who have been identified as leaders and who have expressed interest in implementing new models of co-operation. LIUNA employers would be selected using the same criteria.

The programme, titled "Beyond Bargaining: Developing and Sustaining a Culture of Co-operation" will be a two-week residential course, and will take place in a self-contained conference facility owned and operated by The University of Western Ontario in London, Ontario. The location in this facility will facilitate strong group cohesion and interaction. The facility is exceptionally well-equipped with multi-media equipment, and is designed to enable use of interactive teaching and learning techniques, such as case studies, small group discussions, and team-based projects.

Organisational setting

This initiative is strongly endorsed by the executive of LIUNA, who will promote participation among their members, and with LIUNA employers. LIUNA will support participation by its members through financial support and paid time away from work.

The development of joint models of co-operation is supported at a number of levels, including employers and government. However, this is still a somewhat controversial initiative which will require considerable will and determination by both labour and management in implementing the techniques and ultimately integrating them across the labour movement. This underscores the necessity for joint participation by employers and union leaders, so that 'buy-in' and implementation are facilitated at all levels.

3.6 *Design notes*

Learner characteristics

The learners are from diverse backgrounds: they will include leaders of both unions and management, although they will all be affiliated with LIUNA as either members or employers. Their educational backgrounds will vary, ranging from high school completion and the acquisition of skilled trades certification, to completion of degrees and professional designations at universities. Most of the learners participate in workplace-focused lifelong learning on a regular basis, such as the acquisition of new skills in response to the development of new technologies, or learning related to understanding and guiding more effective operations of union activities. Participants in the programme will be selected on the basis of their willingness to effect workplace change in the area of labour-management co-operation.

Instructional setting

The participants will be adult learners with a variety of learning styles and educational backgrounds. The instruction should be based on adult learning philosophies and principles, cater to a variety of learning styles, and promote interaction between facilitators and participants, and between participants. The programme should encourage and facilitate self-directed learning and team-based discovery through experiential and participatory learning activities.

Organisational setting

There is strong support at the LIUNA executive level for this programme: many employers who work with LIUNA have indicated their support and willingness to participate in promoting more harmonious relations with the unions who provide their workforce. The programme will take place at a neutral and central location removed from the workplace, and participants will attend the programme for two weeks.

There is a concern that the two-week duration of the programme may prevent some employers from participating, as it may be difficult to release key managers for that length of time. Scheduling the programme for two one-week sessions, and during the fall and winter terms, may address this concern. It may also be feasible to develop certain aspects of the programme for online delivery or self-paced instruction to reduce the amount of time required away from the workplace.

3.7 Task analysis

Skills and information necessary to address the identified needs

In order to engage in effective collaboration and interest-based relationships between labour and management, the following are key skills:

1. The ability to understand the foundations of labour-management relationships, comparing traditional and non-traditional approaches, and the benefits and costs of each approach
2. The ability to effectively apply a core skills set focussed on communications and interaction
3. The ability to understand the joint dimensions required for collaborative and interest-based relationships in the 'bigger picture'
4. The ability to identify and implement appropriate models for working together.

Specifically, individuals should be able to:

1. Identify current realities and future possibilities for collaborative and interest-based relationships between labour and management
2. Develop and effectively apply the necessary skill set required to engage in collaborative and interest-based relationships

3. Consider labour and management interests in the context of the larger global picture
4. Develop processes and tools for building effective co-operative relationships
5. Design and engage in interest-based approaches to labour-management relationships in their own organisations.

Critical curriculum elements

Following input from the advisory committee, practitioners in the field, and a review of current literature, the following elements were identified as critical components of the curriculum:

1. Orientation to the history of labour-management relations and joint initiatives in order to relate “where we’ve come from” to “where we’re going”
2. Identifying current developments and change processes that are influencing the move towards collaborative activity
3. Assessing the readiness of an organisation to develop and implement joint models of co-operation
4. Developing and implementing joint strategic planning between labour and management
5. Adult learning approaches to enable movement towards changing and improving relationships between labour and management
6. Group process skills
7. Effective teamwork
8. Facilitation skills
9. Mediation skills

10. Interest-based approaches to bargaining
11. Issues of quality improvement as they relate to the individual and joint organisational activities
12. Partnership issues and the specifics of setting up joint labour-management committees and teams.

Instructional objectives

Topic 1: Perspectives on labour-management relationships

General purpose: To acquire knowledge and understanding of the foundations of labour-management relationships, comparing traditional and non-traditional approaches, and the benefits and costs of each approach

Terminal objective: To identify and analyse current interest-based approaches to labour relations.

Topic 2: Skills for collaborative relationships

General purpose: To acquire understanding of the skills required to engage in effective collaborative and interest-based relationships.

Terminal objective: To develop understanding and proficiency in the skill set required to develop, implement and sustain collaborative relationships.

Topic 3: The macro view and differing perspectives

General purpose: To acquire understanding of the joint dimensions required for successful collaborative and interest-based relationships.

Terminal objective: To develop the ability to evaluate, from different perspectives, workplace issues that affect labour relations.

Topic 4: Tools for building collaborative relationships

General purpose: To examine and acquire techniques and tools for developing joint relationships.

Terminal objective: To identify and implement appropriate models for collaborative relationships.

A focus group, consisting of representatives of LIUNA and LIUNA employers, reviewed and critiqued the draft curriculum at this point. There was overall validation and approval of the curriculum contents and focus to this point.

*Enabling objectives*Topic 1: Perspectives on labour-management relationships

General purpose: To acquire knowledge and understanding of the foundations of labour-management relationships, comparing traditional and non-traditional approaches, and the benefits and costs of each approach

Terminal objective: To identify and analyse current interest-based approaches to labour relations.

Enabling objectives:

1. To review and reflect on historical issues that have influenced the development of the trade union movement
2. To analyse economic trends that are currently influencing the future of the labour movement
3. To identify and compare approaches to labour-management relations

Topic 2: Skills for collaborative relationships

General purpose: To acquire understanding of effective collaborative and interest-based relationships.

Terminal objective: To develop the skill set required to develop, implement and sustain collaborative relationships.

Enabling objectives:

1. To develop a shared understanding of the economic forces that are driving organisational change
2. To identify and practise techniques for effective communication
3. To identify and practise techniques for developing effective workplace teams
4. To identify and practise conflict resolution techniques.

Topic 3: The macro view

General purpose: To acquire understanding of the joint dimensions required for successful collaborative and interest-based relationships.

Terminal objective: To develop the ability to evaluate, from different perspectives, workplace issues that affect labour relations.

Enabling objectives:

1. To identify and analyse perspectives of both management and labour in workplace issues
2. To develop an understanding of business process issues
3. To identify and examine trends in the larger workplace landscape

Topic 4: Tools for building collaborative relationships

General purpose: To examine and acquire techniques and tools for developing joint relationships.

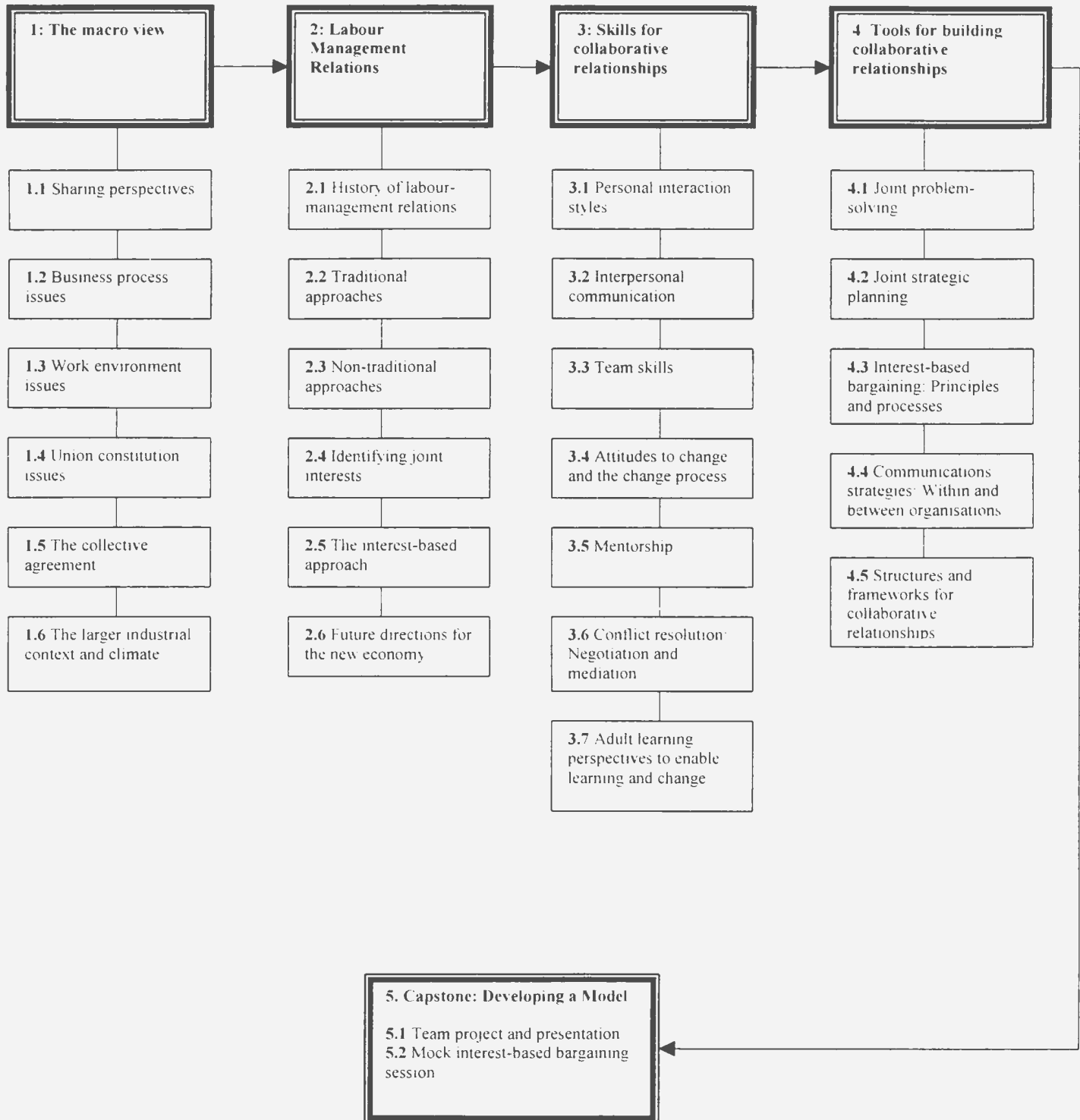
Terminal objective: To identify and implement appropriate models for collaborative relationships.

- Enabling objectives:
1. To identify and examine new joint and interest-based models of working together
 2. To develop techniques for articulating joint issues and interests
 3. To identify and develop strategies for joint problem-solving
 4. To develop and practise skills in the interest-based approach to bargaining.

Curriculum topics and sequence

The curriculum topics and sequence are shown in Table 2.

Table 2 - Task analysis: Curriculum topics and sequence



3.8 *Instructional strategies*

As identified above, participants in this programme will be adult learners with a variety of learning styles and diverse backgrounds. Therefore, it will be essential to base the instruction on adult learning principles in order to facilitate a rewarding and productive learning environment, and to incorporate adult learning techniques and strategies. Adults learn best when they can relate concepts to specifics which are familiar to them. The instruction, then, will progress from specific to general, thereby enabling participants to build on concepts familiar to them in expanding into broader issues and new concepts.

LIUNA has specified that the programme must be offered in a face-to-face, intensive format over a two-week period. The compressed nature of the programme will require that concepts build naturally from the previous concept, and that instructional techniques are varied and learner-centred.

WCCS recommends the use of the case method in its educational programmes. This method enables learners to study and analyse a real-life situation, and requires all participants to become actively engaged in the learning process. Participants must explain, justify and defend their individual and team analyses of the case study, thus developing higher level critical thinking, problem-solving, analytical and communication skills. Cases provide a method for participants to learn by doing, and to take on the roles and responsibilities of specific people in specific organisations (Maufette-Leenders, Erskine and Leenders, 1999).

The case method enables participants to develop confidence in the decision-making process in a supportive environment. Cases are field-based: WCCS will contract with an experienced case writer to develop customised case studies for this programme that will contain detailed information about real-life situations based on information provided by LIUNA and

other members of the advisory committee. A specific case will be designed and written for each topic. The cases will consist of the presentation of specific information and facts relevant to the topic and describing a specific set of circumstances in a specific organisation: this method enables participants to discuss, analyse and evaluate while relating specific instances to broader, more general issues. The case method involves both large and small group work and discussions, and encourages the development of team-based and group processes. It will be particularly valuable learning tool in this programme, as it will enable participants to look at problems and situations from a holistic view and from different perspectives.

Example: Topic 2 Labour-management relations

Participants will engage in a case study describing the current state of labour relations and issues on a particular construction project.

Many of the objectives outlined in the curriculum involve the teaching of interpersonal skills. The emphasis of instruction in achieving these objectives will be on application of the skills. The instructional strategy in this case would involve initial instruction to present the model, followed by the development of a verbal model, rehearsal of the model, and finally, overt practice of the model (Morrison, Ross and Kemp, 2001). This model lends itself well to case studies, role-plays, simulations, and small group work.

Example: 3.3 Team skills

Modelling and practice to develop team skills

The use of short lectures enables the presentation of specific background information. This method allows participants to learn about concepts and facts which can be used in case studies or assimilated into further discussion and analysis.

Example: 1.6 The larger industrial landscape

Short lecture on current issues related to globalisation, and its impact on the economy.

The final capstone project will bring together all the various components into a practical application exercise. This final dimension involves a team-based approach to developing a framework for implementing and evaluating a collaborative and interest-based model between labour and management within their respective organisations. Participants will design and actively participate in a mock interest-based negotiation process, and will debrief at the end of the session. The capstone project will be designed and facilitated by an experienced professional negotiator with expertise in successful interest-based negotiation.

Additionally, as the focus of the programme is on joint development of new models, it will be important to ensure that there is representation from both labour and management.

3.9 *Course outlines*

Course outlines for “Beyond Bargaining” were developed from the input received to date; outlines are attached at Appendix B. The course outlines were reviewed, critiqued and approved by the focus group prior to receiving final approval from the LIUNA Advisory Committee.

Pre-instructional strategies

In order to make maximum use of the time allotted to this programme, participants will receive pre-session materials to be read prior to the commencement of the programme. The materials will provide a framework for the session, and acquaint participants with the goals and objectives of the programme.

The case studies for each topic will be presented in the pre-session materials, in addition to a short introduction to the goals, objectives, purpose and processes of the case method. The schedule for the two-week session will be outlined, as well as expectations for participation and preparation.

Final course design

The individual faculty members hired to instruct the programme will complete the final course design (selection of resources, specific instructional strategies, activities, and evaluation strategies). They will be guided by the course outlines above.

3.10 Evaluation

Formative evaluation

The advisory committee for this programme, consisting of representatives from labour and management, LIUNA, and expert practitioners, has provided input and feedback throughout the development of the programme. The committee has guided the establishment of critical elements, goals and objectives, and has helped to establish priorities in course content. LIUNA has provided additional feedback throughout the development, and is satisfied that the programme will meet their needs.

Additional feedback was obtained from a focus group, conducted midway through the process of articulating the essential elements of the programme. The focus group consisted of representatives of LIUNA members and employers. Feedback from this group confirmed the goals and objectives of the proposed programme, the critical elements, and helped to clarify and establish the priorities and the instructional strategies.

Summative evaluation

Participants and LIUNA officials will be asked to provide their feedback at the conclusion of the programme concerning:

- The effectiveness of the programme
- The degree to which the goals and objectives of the programme were met
- Attitudes and reactions of participants towards the instruction
- The long-term benefits of the instruction.

This data will be obtained through ratings scales and through follow-up surveys at three- and six-month intervals. Results of the surveys and ratings will be tabulated and discussed with LIUNA to identify areas for improvement in subsequent offerings of the programme. Following Kirkpatrick's four-level approach to evaluation of training programmes (Kirkpatrick, 1998), evaluation will be designed to assess:

- Reaction
- Learning
- Behaviour
- Results

LIUNA executive members and employers will be surveyed six months after the programme as to their perceptions of its effectiveness. Indicators of effectiveness can include such factors as:

- Increased productivity
- Decreased grievance activity
- Shorter time frame required for conclusion of collective bargaining

- Reduced absenteeism
- Increased profitability

Samples of proposed evaluation ratings scales and instruments are attached at Appendix “C”.

Long-range plans

As a new and innovative initiative, this programme will require careful planning by participants for its implementation in their workplaces, and long-range monitoring as to its effectiveness and success. Fundamental workplace relationships will likely not change rapidly or smoothly; in fact, many participants in this programme will likely face significant resistance to initiating the development and implementation of new co-operative labour-management relations.

The implementation of “Beyond Bargaining” in the workplace will be a joint initiative between labour and management: this will provide a strong foundation for a successful implementation on their return to the workplace. Participants in the programme will represent both labour and management for their respective employers, and they will jointly develop a plan for the implementation of the new model during the programme. The programme instructors and other participants will jointly critique this plan and recommend changes and improvements prior to the close of the session.

Change in organisations is rarely made easily or quickly. According to Greenberg *et al* (2000), change is most likely to occur when the individuals involved believe that the benefits associated with making a change outweigh the costs involved. The factors contributing to the benefits and likelihood for success of making a change include (1) the level of dissatisfaction with what currently exists, (2) the availability of a desirable alternative, and (3) the existence of a

plan for achieving that alternative. Robbins and Langton (2001) identify 6 key tactics in overcoming resistance to change, and increasing the likelihood of bringing about successful and long-lasting change, including (1) education and communication, (2) participation, (3) facilitation and support, (4) negotiation, (5) manipulation and co-option, and (6) coercion. While the first four tactics are positive and supportive of the goals of "Beyond Bargaining", use of the last two (manipulation/co-option and coercion) would certainly lead to the failure of developing new and improved labour-management relations in a unionised environment, and participants will be cautioned against using them. Co-option and coercion are tactics of which unions have become wary, and which ultimately destroy the credibility of both management and union leaders. Robbins and Langton (2000) go on to identify four essential elements for bringing about successful change in a unionised environment: (1) the development and implementation of an effective system for resolving day-to-day issues, (2) a jointly administered business education process, whereby all employees learn the basic business and financial processes of the company, (3) a jointly developed strategic vision for the organisation, and (4) a non-traditional problem-solving method of negotiating collective agreements.

'Lessons learned' from previous attempts at developing more co-operative workplace relationships provide a framework for enhancing the successful implementation of the principles of "Beyond Bargaining" and support the ideas of Greenberg *et al* (2001) and Robbins and Langton (2000) discussed above. Clarke and Haiven (1999) detail a previous attempt at implementing more co-operative relationships between Saskatoon Chemicals (Shell Canada) and a local of the Communications, Energy and Paperworkers Union from 1991 to 1995. While the attempt made significant inroads into developing joint relationships and reducing the confrontational approach to labour relations, it was ultimately derailed by traditionalist forces

within the union who were critical of change and felt that the union was being co-opted by management. Communications appear to be the key to both the success and the failure of this attempt. Initially, clear and open communications between the union and management, and between the union and its members, led to support for the initiative, and its early success. However, as a minority group of traditionalists became more vocal in their distrust of both management and the union leaders, and their assertion that the union was being co-opted by management, the union failed to respond to this criticism, fearing a confrontation which would curtail the initiative. Ultimately, this is exactly what did happen, as the lack of communication with the members (the majority of whom supported the initiative) enabled a small group of traditionalists to vote the executive out of office, and end the project.

The Saskatoon Chemicals case will be used as the basis for a case study, and participants in "Beyond Bargaining" will be encouraged to use this, and other cases, in identifying potential pitfalls and strategies for success as they develop their joint model for implementation. Participants will consider a variety of tactics to incorporate into their strategic plan for implementation in the workplace. The Saskatoon Chemicals experience suggests that leadership is a key factor in bringing about workplace and organisational change: participants will be encouraged to consider their own personal development needs in this area, and to include a plan for continuing learning and training for themselves and their colleagues. As discussed above, a key factor in the implementation plan will be the development of a communications strategy, together with plans for training and education, participation, facilitation and support, resource allocation, and dealing with resistance.

As noted earlier, follow-up surveys will be conducted with participants to assess the impact of the implementation, and to identify successful strategies and tactics, as well as to note

and discuss difficulties and failures. The lead instructor for the programme will be retained on contract for a period of one year to provide consultation and advice, at no charge, to participants as requested.

The WCCS is currently developing a proposal for a research grant to conduct more formal long-term research into the results of the programme. The research will be carried out over a three-year period, and will be a joint initiative with UWO's Faculty of Social Science.

CHAPTER 4 - IMPLEMENTATION PLAN

As “Beyond Bargaining” has been custom-designed for a specific client (LIUNA), implementation and marketing plans are somewhat simplified. As discussed above, LIUNA has established specific requirements for the programme: it must be residential and a two-week format. The programme will operate on a for-profit basis, with LIUNA covering the costs of participation for its members, delivered during October, 2001.

Instructional staff will be hired on a contractual basis, and will be co-ordinated by a lead instructor. They will be experts in their field, and will be committed to the notion of developing new models of labour-management relations. Faculty for this programme will be responsible for completing the course content, outline and learning activities, based on the criteria established above. Administrative staff functions will be carried out by staff of the WCCS.

Once the dates have been confirmed with LIUNA, the conference facility will be booked, and logistical details associated with the programme will be identified, assigned and scheduled. Examples of logistical details include catering, ordering of equipment and supplies, printing of the contracted case studies, and preparation of class materials.

The tuition fee for the programme will be set using the established WCCS model. The fee charged will cover all costs associated with instruction, supplies and materials, room rentals, advertising, and administration.

4.1 Marketing plan

LIUNA will select its own participants, and will market the programme to LIUNA employers. Management representatives on the advisory committee will assist in marketing the programme to their colleagues.

The WCCS will prepare and distribute a promotional brochure to all LIUNA locals and signatory employers across the country, and will establish a page on its web site dedicated to the programme.

4.2 Presentation to LIUNA Conference

As part of its marketing plan, the WCCS made a presentation at LIUNA's annual International Tri-Fund Convention in Orlando, Florida on February 27, 2001. This conference was attended by over 1000 delegates from the United States and Canada, and included LIUNA business agents, executive members, and organisers, as well as LIUNA signatory employers. A preliminary brochure was prepared and distributed to all attendees at the session (attached at Appendix "D").

The presentation provided an overview of the programme development to date, and the rationale for the need for this programme. The programme outline was presented in detail, and participants were then provided with examples of practical applications of the skills and key concepts. Attendees were invited to provide feedback on what they had heard about the programme, and to discuss (publicly or privately after the presentation) any concerns or issues relating to any aspects of the programme. Feedback and support were overwhelmingly positive: many employers indicated their commitment to work with LIUNA to facilitate participation in the October session.

The outcomes of the first offering of this programme will determine future marketing activities. Indications from many sources consulted during the research and development phases suggested that there is a vast untapped market for this programme throughout Ontario. In fact, representatives of the Ontario provincial government have indicated their interest in the proposed

programme, and have suggested that they are willing to consider funding a more widespread delivery following the completion of the pilot programme for LIUNA.

CHAPTER 5 - SUMMARY

The field of labour relations is experiencing significant change as the new economy drives the reshaping of traditional business models and paradigms. The emergence of the global economy, resulting in global competition, is challenging both labour and management to examine their traditional philosophies and operating norms, and to identify new ways of working more co-operatively together if they are each to continue to exert influence and shape the future of the workforce.

The traditional and adversarial relationship that has existed between labour and management is costly and counter-productive. The traditional approach promotes and maintains an 'us and them' mentality, which further enshrines the notion of winning and losing. However, in devoting time, energy and resources to dealing with costly work stoppages, grievances and arbitrations, labour and management are in danger of losing their competitive edge in an increasingly competitive world.

By learning to work more closely and harmoniously together, and by addressing joint interests, rather than differences, labour and management have an opportunity to redefine their relationship, and profit from the strength of working together rather than against each other. Bill 139, passed recently by the Ontario government, provides both a challenge and an opportunity to labour unions to examine their missions, visions and mandates, and to create a new role for themselves in the twenty-first century. The government of Ontario is aiming to promote the province as a good place to do business; however, it is up to labour unions to take up the challenge of finding new ways to work within the legislation.

It appears that the timing is right for developing and implementing an educational programme that will provide opportunities for labour and management to jointly explore, examine, and develop the skills that will enable them to redefine and recreate their relationship from one based on differences to one based on joint interests. Interest in the programme proposed by WCCS has been expressed by all sectors of the workplace – labour, management, workers and government. This programme has been developed in partnership with a union that sees itself as having the capacity and the vision to lead the way in developing new ways of working with management, and to redefine its mandate as a means of remaining relevant and integral to the well-being of its members.

The process of developing the programme has been systematic and thorough. Input into the focus, goals and objectives has been solicited from experts with different perspectives and on a number of levels at regular intervals. This input has enabled the creation of a programme that is forward-thinking, relevant and innovative.

While the project appears to be well-poised to accomplish the initial goal of meeting LIUNA's educational need, other more long-term benefits have already emerged. Interest in the programme has encouraged other faculties at The University of Western Ontario to approach WCCS to partner in developing a more comprehensive university-level credential to meet the needs of both practitioners in the field of labour relations and undergraduate business students at The University of Western Ontario.

5.1 Summary of personal learning outcomes

This project proved to be an invaluable learning experience at many levels. The research carried out provided significant personal insights into and understanding of the field of labour relations, and a much deeper appreciation of the challenges facing both labour and management

in today's changing economy. In particular, the research carried out identified an emerging need for labour and management to identify and implement new methods of working more harmoniously if they are both to survive and prosper in a global and competitive marketplace.

The opportunity to work closely with a union provided significant insight into the values and driving principles of the labour movement. It was also of interest to observe the different factions at play within organised labour. As government legislation and the impact of the changing economy are starting to impact and challenge the viability of organised labour, many unions have adopted a 'stand fast' approach to labour-management relations; their goal is to maintain the status quo, and to remain entrenched in the traditional confrontational approach. Very few unions have identified and acknowledged a need to change their relationship with management in response to the significant and fundamental changes that are affecting the way that business operates in the new and global economy. Unions that advocate the development of new models of co-operation with management are, indeed, in large part shunned by those unions that champion the maintenance of the adversarial approach to labour-management relations.

As noted above, this particular project has sparked interest in the field of labour relations at UWO. Not only has this project led to interest in developing additional programmes in this field at UWO, but the senior administrative officers of the University have endorsed the initiative as filling an academic gap at Western: this endorsement places the WCCS in a leadership position within the academic community of UWO.

Finally, the project has allowed for the improvement of personal skills and knowledge in the area of programme development. Previous personal projects in programme development have been in areas that were focused on smaller programme segments, or in subject areas that were already fairly well researched. This particular project required significant research and

investigation into a relatively untried field, and required the development of new contacts and resources in developing a unique and innovative response to a somewhat controversial need. The opportunity to build a programme from the ground up challenged creative and critical thinking skills, while at the same time refining and reinforcing the need for a systematic approach to programme development.

The first offering of the programme is scheduled for October, 2001 in London, Ontario. Preliminary responses indicate that the programme responds well to the needs identified by LIUNA, and that participation will be high.

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Appendix A

Survey of LIUNA Business Managers

***Needs and Critical Element Survey for the Development of a
Program of Study in Labour-Management Co-operation***

- 1) Please comment on your perception of the need and value of a program of study designed to promote successful labour-management co-operation by placing an "x" next to the most appropriate indicator. Space is also provided for you to make further comments related to this question.

- | | |
|--|-----------|
| <input type="checkbox"/> Not important
<input type="checkbox"/> Somewhat important
<input type="checkbox"/> Neutral
<input type="checkbox"/> Important
<input type="checkbox"/> Very important | Comments: |
|--|-----------|

- 2) Listed below are "some" critical elements of successful labour-management co-operation. Please indicate your perception of the importance of each of these by placing an "x" next to the most appropriate indicator. Space is also provided for you to make further comments related to each "element".

a) Orientation to past labour-management relations and joint activities

- | | |
|--|-----------|
| <input type="checkbox"/> Not important
<input type="checkbox"/> Somewhat important
<input type="checkbox"/> Neutral
<input type="checkbox"/> Important
<input type="checkbox"/> Very important | Comments: |
|--|-----------|

b) Assessing readiness for collaborative activity between labour and management organizational climate assessment)

- | | |
|--|-----------|
| <input type="checkbox"/> Not important
<input type="checkbox"/> Somewhat important
<input type="checkbox"/> Neutral
<input type="checkbox"/> Important
<input type="checkbox"/> Very important | Comments: |
|--|-----------|

c) Change processes that are influencing the move toward collaborative activity

- | | |
|--|-----------|
| <input type="checkbox"/> Not important
<input type="checkbox"/> Somewhat important
<input type="checkbox"/> Neutral
<input type="checkbox"/> Important
<input type="checkbox"/> Very important | Comments: |
|--|-----------|

d) Joint strategic planning between labour and management

- ☐ Not important Comments:
☐ Somewhat important
☐ Neutral
☐ Important
☐ Very important

e) Adult learning approaches to enable movement toward changing relationships between labour and management

- ☐ Not important Comments:
☐ Somewhat important
☐ Neutral
☐ Important
☐ Very important

f) Team based group process skills

- ☐ Not important Comments:
☐ Somewhat important
☐ Neutral
☐ Important
☐ Very important

g) Exploring, designing and harnessing the power of workplace teams

- ☐ Not important Comments:
☐ Somewhat important
☐ Neutral
☐ Important
☐ Very important

h) Facilitator and mediator training to enable the above

- ☐ Not important Comments:
☐ Somewhat important
☐ Neutral
☐ Important
☐ Very important

i) Issues of quality improvement as they relate to the individual and joint organisational activities

- | | |
|---|-----------|
| <input type="checkbox"/> Not important | Comments: |
| <input type="checkbox"/> Somewhat important | |
| <input type="checkbox"/> Neutral | |
| <input type="checkbox"/> Important | |
| <input type="checkbox"/> Very important | |

j) Interest/target based bargaining

- | | |
|---|-----------|
| <input type="checkbox"/> Not important | Comments: |
| <input type="checkbox"/> Somewhat important | |
| <input type="checkbox"/> Neutral | |
| <input type="checkbox"/> Important | |
| <input type="checkbox"/> Very important | |

k) Partnership issues and "how to's" in setting up a joint labour-management committee either for specific organizations or regions

- | | |
|---|-----------|
| <input type="checkbox"/> Not important | Comments: |
| <input type="checkbox"/> Somewhat important | |
| <input type="checkbox"/> Neutral | |
| <input type="checkbox"/> Important | |
| <input type="checkbox"/> Very important | |

3) What other elements of successful labour-management co-operation do you perceive as important that have not been mentioned above? Please explain in the space provided.

Summary of survey results

1. Please comment on your perception of the need and value of a program of study designed to promote successful labour-management co-operation by placing an "x" next to the most appropriate indicator.

Not important	0
Somewhat important	0
Neutral	2
Important	15
Very important	4
Total	21

2. Listed below are "some" critical elements of successful labour-management co-operation. Please indicate your perception of the importance of each of these by placing an "x" next to the most appropriate indicator.

- a) Orientation to past labour-management relations and joint activities

Not important	0
Somewhat important	0
Neutral	2
Important	8
Very important	11
Total	21

- b) Assessing readiness for collaborative activity between labour and management organizational climate assessment

Not important	0
Somewhat important	2
Neutral	3
Important	14
Very important	2
Total	21

c) Change processes that are influencing the move toward collaborative activity

Not important	0
Somewhat important	0
Neutral	1
Important	3
Very important	17
Total	21

d) Joint strategic planning between labour and management

Not important	0
Somewhat important	0
Neutral	2
Important	4
Very important	15
Total	21

e) Adult learning approaches to enable movement toward changing relationships between labour and management

Not important	2
Somewhat important	4
Neutral	3
Important	6
Very important	6
Total	21

f) Team based group process skills

Not important	0
Somewhat important	0
Neutral	3
Important	10
Very important	8
Total	21

g) Exploring, designing and harnessing the power of workplace teams

Not important	0
Somewhat important	2
Neutral	6
Important	6
Very important	7
Total	21

g) Facilitator and mediator training to enable the above

Not important	1
Somewhat important	1
Neutral	5
Important	8
Very important	6
Total	21

h) Issues of quality improvement as they relate to the individual and joint organisational activities

Not important	1
Somewhat important	3
Neutral	6
Important	5
Very important	4
Total	20

i) Interest target based bargaining

Not important	0
Somewhat important	0
Neutral	0
Important	4
Very important	17
Total	21

- j) Partnership issues and "how to's" in setting up a joint labour-management committee either for specific organizations or regions

Not important	0
Somewhat important	0
Neutral	2
Important	2
Very important	15
Total	19

- 3) What other elements of successful labour-management co-operation do you perceive as important that have not been mentioned above? Please explain in the space provided.

- Impact of government legislation - Bill 139
- Communications
- Changes in the workplace
- ADR
- Collective bargaining

Appendix B
Course Outlines

The Macro View

Objectives:

Participants will:

- Identify and develop a shared understanding of the key issues related to business process, work environment, union constitution, the collective agreement and current labour legislation
- Consider implications for each of the above in terms of trends and issues in the larger industrial landscape.
- Identify and discuss the implications and opportunities for new and renewed co-operative relationships between labour and management.

Topics:

- Employer business perspective
- Work environment perspective
- Union perspective
- The collective agreement
- Government legislative perspective
- Global industrial perspective

Resources:

- Background readings
- Keynote addresses by renowned leaders for each of the topic areas

Instructional Strategies:

- Keynote addresses to provide perspectives from different stakeholders in the field of labour-management relations
- Facilitated group discussion perspective sharing on key issues

Desired Outcomes:

- Participants will be challenged to think "outside of the box" beyond their own immediate positions on issues related to labour-management relations.

Labour-Management Relations

Goals: To examine and analyse the history of the labour movement, and how it has impacted the current state of labour-management relations.

(Where have we been and where do we go from here?)

To examine, analyse and discuss alternatives to traditional approaches in labour-management relations.

Objectives:

Participants will:

- Examine the history of the labour movement, its history within society and its impact in the workplace.
- Identify and examine their individual interpretations of fundamental perspectives related to labour-management relations.
- Identify and critique various interest-based approaches to labour-management relationships.
- Identify and examine different approaches to developing and implementing approaches for reducing conflict.

Topics:

History of labour-management relations

- The development of unions and their acceptance within society
- The relationship of unions to legal frameworks
- The Wagner Act and Bill P.C. 1003
- The role of government and legislation in labour-management relations
- The current legal framework, including the Ontario Labour Relations Act

Traditional approaches to labour-management relations

- Different perceptions of traditional approaches
- The legal framework that supports traditional approaches

Non-traditional approaches

- Current thinking and assumptions
- Current case law, arbitration cases and Labour Board cases
- Living agreements - overview

Alternatives to traditional approaches

- Overview of alternative approaches
- Win-win approaches
- The Harvard Model
- Building trust

Interest-based approaches

- Overview of interest-based principles and objectives
- Problem-solving approaches

Future directions for the new economy

- Increasing globalisation
- Workplace democracy issues
- Government initiatives to attract business
- Perceived barriers to attracting business
- Bill 139 – perspectives and implications
- Living agreements

Resources:

- Case study
- Background readings
- Current legislation

Instructional strategies:

- Role-plays and other interactive techniques designed to provide the participants with practical models appropriate to their current environment
- Short lectures to provide a framework and grounding for discussion
- Case study
- Group discussion
- Group project presentation

Desired outcomes:

1. Interaction between participants and facilitator, and a sharing of their experiences, will enable participants to develop their own framework for models of joint relations.
2. Participants will develop their ability to challenge the norm, to promote innovative thinking, and to move the IR HRM model to the next level.

Skills for collaborative relationships**Module:** Personal Interaction Styles**Objectives:**

Participants will:

- Determine their personal interaction styles
- Identify the strengths and weaknesses of their interaction style
- Build awareness of the interaction needs of others

Topics:

- Personal communication strengths and weaknesses
- Tools to enhance personal interaction styles
- Interaction effects of various personality styles
- Interaction needs of other personality styles

Resources:

- Interaction style inventories
- Background readings
- Case studies

Instructional Strategies:

- Role-plays and other interactive techniques designed to provide the participants with practical applications relevant to issues related labour management environment.
- Short lecture to provide a framework and grounding for discussion.
- Case studies
- Group discussion: perspective sharing

Desired Outcome:

- Participants will develop an enhanced understanding of their own style of interaction and the effect this has in regard to their interactions with others.
- Participants will contribute to the building of effective relationships in the day to day work environment by considering the interaction needs of other personality types.

Module: Interpersonal Communications**Objectives:**

Participants will:

- Identify the forces and challenges that lead to conflict.
- Apply the principles and processes of motivating and influencing others.
- Demonstrate an understanding of the tools and techniques of listening skills and effective feedback.

Topics:

- Listening skills – active versus passive
- Feedback
- Building credibility, trust and respect

Resources:

- Interaction style inventories
- Background readings
- Case studies

Instructional Strategies:

- Role-plays and other interactive techniques designed to provide the participants with practical applications relevant to issues related labour management environment.
- Short lecture to provide a framework and grounding for discussion.
- Case studies
- Group discussion perspective sharing

Desired Outcomes:

- Participants will employ the principles and processes of effective interpersonal communications to enable clear, honest and productive communications between labour and management.

Module: Teambuilding**Objectives:****Participants will:**

- Demonstrate understanding of the principles and processes of effective teamwork by engaging in case based discussion and analysis of effective and ineffective team dynamics and activity.
- Apply the principles and processes of effective teamwork to simulated team problem solving situations related to joint labour-management activity.

Topics:

- What is a team?
- Defining the structure
- Determining the process
- Creating the culture

Setting the stage: “control” versus “order”

- Role of the team leader
- Leadership styles
- Coaching (liaising, resourcing, counselling, mentoring, teaching, challenging)
- Facilitating (skills, processes and activities for effective team building, team learning and teamwork)

Implementing and managing the work of the team

- Creating the team charter
- Problem identification and problem solving processes and strategies to avert overcome obstacles
- Dealing with diversity of interest
- Developing goals, tasks and measures to guide and evaluate the work
- Linking the work back to the bigger picture
- Influencing the larger organization

Evaluating the team process**Resources:**

- Background readings
- Case studies
- Team problem solving game

Instructional Strategies

- Role-plays and other interactive techniques designed to provide the participants with practical applications relevant to issues related labour management environment.
- Short lecture to provide a framework and grounding for discussion
- Case studies
- Group discussion/perspective sharing
- Group project/presentation

Desired Outcomes

Participants will develop and enhance their ability to lead, facilitate and participate in joint labour-management activity.

Module: Attitudes to change and the change process

Objectives:

Participants will:

- identify the forces and challenges for changing relationships between labour-management.
- demonstrate understanding of the human factors involved in change, readiness for change, reactions to change, and approaches to overcoming resistance to change.
- apply the principles and processes of initiating and leading change as they relate to labour-management relationships.

Topics:

- Definitions of change
- Forces and challenges for changing relationships between labour and management
- A model of change (principles and processes)
 - analyzing organization and need for change
 - creating a shared vision and common direction
 - separating from the past
 - creating a sense of urgency
 - supporting a strong leader role
 - lining up political sponsorship
 - crafting an implementation plan
 - developing enabling structures
 - communicating, involving people, building support and trust
 - reinforcing and institutionalising change
- The recipients of change
 - Human factors involved in change
- Readiness for change
- Reactions to change
- Overcoming resistance to change
- The change agent
 - Roles
 - Challenges

Resources:

- Background readings
- Case studies

Instructional Strategies:

- Role-plays and other interactive techniques designed to provide the participants with practical applications relevant to issues related labour management environment.
- Short lecture to provide a framework and grounding for discussion.
- Case studies
- Group discussion/perspective sharing
- Group project/presentation - Change implementation plan for a joint labour-management initiative

Desired outcomes:

- Participants will develop skills and competence in leading and participating effectively in change initiatives related to joint labour- management activity.

Module: Adult learning perspectives to support changing relationships between labour and management.

Objectives:

Participants will:

- consider and apply the principles and processes of adult learning to prepare individuals and groups to identify and engage in effective and productive joint labour-management activity.
- consider the principles and processes of organisational learning and how these can be applied to prepare and build an inter-organisational capacity for joint labour-management relations.

Topics:

- How do adults learn best?
- Motivation to learn within an organization
- Barriers to learning within an organization
- Differing learning styles
- Approaches to the design and facilitation of learning opportunities
- Organisational learning
 - Building a shared understanding that is communicated openly throughout the organization(s)
 - Examining and shifting old ways of thinking and standard routines
 - Orientation to learning and change
 - Organisational processes, activities, functions and interactions as part of the larger system of inter-relationships
 - Team and collaborative learning

Resources:

- Background readings
- Case studies

Instructional Strategies:

- Role-plays and other interactive techniques designed to provide the participants with practical applications relevant to issues related labour management environment.
- Short lecture to provide a framework and grounding for discussion
- Case studies
- Group discussion/perspective sharing
- Group project: Design and facilitation of an organisational learning opportunity related to a joint labour-management initiative.

Desired outcomes:

- By drawing on current perspectives in adult and organisational learning participants will support and facilitate change behaviour related to labour management activity.

Module: Mentoring as a means to support and sustain learning toward effective joint-labour management activity.

Objectives:

- Participants will successfully apply the principles and processes of mentoring as a means of supporting and sustaining change and learning by engaging in discussion, interactive group work and analysis of case studies related to joint labour-management activity.

Topics:

- What is mentoring?
- Rationale
 - Why bother?
 - Benefits and costs to individuals, teams and organizations
 - The impact of not mentoring
- Functions and principles of effective mentoring
 - Mentor interactions
 - situational response – spontaneous, isolated acts
 - informal relationships –interpersonal agreement or understanding, flexible and loosely structured
 - formal programme – structured programme to meet organisational goals
 - Role of a mentor
 - Personal mentoring skills (relationship building, effective communications, listening and asking questions, creation of adaptive network of learners, leadership, commitment to organisational development, exploring options)
 - Understanding mentee needs
 - signals
 - expectations
 - patterns
 - Criteria and selection process for mentors and mentees
 - Mentoring programme models to facilitate movement toward effective joint labour-management activity

Resources:

- Background readings
- Case studies

Instructional Strategies:

- Role-plays and other interactive techniques designed to provide the participants with practical applications relevant to issues related labour management environment.
- Short lecture to provide a framework and grounding for discussion.
- Case studies
- Group discussion perspective sharing

Desired Outcome:

- Interaction between participants and facilitator, and a sharing of their experiences, will enable participants to employ the principles and processes of effective informal and formal mentoring throughout their respective organizations as a means to facilitate and sustain evolving labour management relationships.

Module: Conflict Resolution**Objectives:**

Participants will:

- Identify the differences between mediation and negotiation.
- Demonstrate an understanding of the different conflict handling modes and when to employ.
- Apply techniques to direct conflict to productive commitment.
- Create an environment of collaboration.
- Identify the 5 tenets of negotiation.

Topics:

- Difference between mediation and negotiation
- Minimising conflict and building productive commitment
- Conflict Handling Modes strengths and weaknesses
- Creating an environment of collaboration
- Influencing others and motivating them to profitable action
- 5 tenets of negotiation

Resources:

- Background readings
- Case studies

Instructional Strategies:

- Role-plays and other interactive techniques designed to provide the participants with practical applications relevant to issues related labour management environment.
- Short lecture to provide a framework and grounding for discussion.
- Case studies
- Group discussion perspective sharing

Desired Outcome:

Participants will develop, enhance and apply the skills of conflict resolution to enable productive joint labour-management activity.

Tools for Building Joint Relationships

Goals: To develop a framework for initiating and implementing new models for joint relationships.

To develop skills and processes for joint problem-solving and planning.

To develop skills to provide leadership in developing capacity in others.

Objectives: Participants will:

- Identify and discuss new strategic directions for the future of labour-management relations.
- Identify and challenge their understanding of labour-management relations, and jointly examine a new methodology for future relationships.
- Identify and develop skills that challenge and move the accepted norm to greater ranges than current practices.
- Examine and develop skills in using interest-based approaches to labour-management relationships.
- Examine and compare a variety of current interest-based approaches, including the Harvard Model.
- Identify and develop applications for incorporating interest-based approaches in the day-to-day administration of a collective agreement.
- Identify and examine concepts and processes that will move labour-management relationships in a direction that will reduce conflict.
- Identify and examine the tools required to implement and sustain new models of joint relationships.

Topics:

Joint problem-solving

- Interest-based approaches
- Non-traditional solutions

Joint strategic planning

- Sharing information
- Building trust
- Communications
- Mission and vision
- Economic and budget information and forecasts

Interest-based bargaining: Principles and processes

- Hard vs. soft bargaining
- Criteria
- Focus on interests, not position
- Options

Communications strategies

- Communications within and between organizations
- Joint communications plan
- Traditionalists
- Aligning vision and mission of local office with national office
- Contingency planning

Structures and frameworks for joint relationships

- Aligning visions and missions – union and employer
- Interactive committees and sub-committees
- Empowerment
- Responding to unforeseen change
- Tying framework into living agreement

Resources:

- Case studies
- Background readings
- Current legislation
- Current arbitration and Labour Board cases

Instructional strategies:

- Role-plays and other interactive techniques designed to provide the participants with practical models appropriate to their current environment.
- Short lectures to provide a framework and grounding for discussion.
- Case studies
- Group discussion
- Group project presentation
- Mock interest-based bargaining session

Desired outcomes:

1. Interaction between participants and facilitator, and hands-on skills practice and application, will enable participants to develop their skills in building joint relationships.
2. Participants will build their own capacity to provide leadership in developing new models for joint relationships

Capstone – Developing a Model

Module: Mock interest based bargaining

Objective: Participants will participate in a mock negotiation that requires them to apply the skills, tools and processes of collaborative problem solving to come to an interest-based solution.

Module: Designing a framework to facilitate joint labour management relationships

Objective: Working in labour-management teams participants will develop a plan for introducing, implementing and evaluating joint approaches to labour-management relations within their respective organizations.

Appendix C

Sample Evaluation Instruments

Level 1 Evaluation – Evaluating Reaction

This level of evaluation will be conducted at the conclusion of the program.

Beyond Bargaining: Developing and Sustaining a Culture of Co-operation Program Evaluation					
Curriculum	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
1. The goals of the program were clearly stated					
2. The topics discussed were relevant					
3. The topics enhanced my knowledge and understanding of co-operative labour-management relationships					
4. The course topics were arranged and presented in a logical way					
5. The course materials contributed to my learning and will serve as a useful resource					
6. The course provided opportunities for practical application of theories and ideas					
7. The curriculum challenged me to think 'outside the box'					
8. The curriculum provided a valuable and practical model for developing new models of labour-management relations					
9. The program met my expectations					
10. The curriculum provided a valuable and practical model for developing new models for co-operation in my workplace					
Instruction					
11. The instructors were knowledgeable and able to answer questions					
12. The instructors were well prepared					
13. The instructors challenged me					
14. The instructors made the subject matter interesting					
15. The instructors encouraged participation					
16. The instructors were professional and demonstrated an understanding of adult learning					
17. The instructors encouraged discussion and the exchange of ideas					
Overall Comments					
18. Please provide your overall evaluation of this program					
19. What areas require improvement?					
20. Please add any other comments . . .					

Level 3 Evaluation – Evaluating Behaviour

This level of evaluation will be conducted 3 months after the programme. Each of the participants in “Beyond Bargaining” will be contacted by telephone and asked for their feedback on the programme, and to describe what changes have happened in their workplace since they participated in the programme. The focus of this evaluation will be on (1) evaluating the impact of the programme on bringing about changes in behaviour and (2) improving future programmes.

The evaluation questions will be the same for each participant, and will be related to the programme goals and objectives. This evaluation is based on a sample in Kirkpatrick (1998).

Sample questions may include:

1. To what extent have you been able to begin the implementation of the skills and knowledge taught in “Beyond Bargaining?”

- ☐ To a great extent
☐ To some extent
☐ Not at all

2. Please describe the current status of the implementation of the model you developed in “Beyond Bargaining.” _____

3. If you answered ‘not at all’ to Question 1, please explain.

4. How effective were the skills and knowledge taught in each of the modules?

- | | |
|--|---|
| The macro view | <input type="checkbox"/> Very effective
<input type="checkbox"/> Somewhat effective
<input type="checkbox"/> Not at all effective |
| Perspectives on labour-management relations | <input type="checkbox"/> Very effective
<input type="checkbox"/> Somewhat effective
<input type="checkbox"/> Not at all effective |
| Skills for collaborative relationships | <input type="checkbox"/> Very effective
<input type="checkbox"/> Somewhat effective
<input type="checkbox"/> Not at all effective |
| Tools for building collaborative relationships | <input type="checkbox"/> Very effective
<input type="checkbox"/> Somewhat effective
<input type="checkbox"/> Not at all effective |

Please elaborate _____

5. Please describe your experience so far in implementing the model you developed.

6. What aspects of "Beyond Bargaining" have been helpful to you?

7. What aspects of "Beyond Bargaining" have **not** been helpful to you?

8. As you think back on the programme, what would have made it more helpful to you?

Appendix D

Preliminary Programme Brochure

Beyond Bargaining: Developing and Sustaining a Culture of Co-operation

Significant and fundamental changes in the economy, the workforce and government legislation are having an impact on the trade union movement and management in Ontario. Labour and management are being challenged to examine their roles at various levels, to find ways of remaining successful and working well together in a global workplace where the rules keep changing . . .

Change brings opportunities as well as challenges. Labour and management can move forward to re-define their relationship and their mandate in developing new ways of working together. Joint opportunities exist for identifying and implementing new ways to ensure that they promote and influence their interests in today's rapidly changing work environment.

The Western Centre for Continuing Studies, in partnership with the Labourers' International Union of North America, offers an innovative educational program that responds to these opportunities for change. This program provides participants from both labour and management with a framework to explore the strategic development and implementation of new models for joint relationships.

Who Should Attend?

This program is designed for representatives of both labour and management, ideally representing the same organization and or company.

Program Format

The program will encourage participants to challenge traditional assumptions and models by examining and considering different perspectives; the focus is on developing practical skills and tools to build and sustain new and joint relationships. The program is learner-centred, and facilitates joint learning between labour and management. It is designed as an intense and interactive learning experience, offered in a two-week period.

Program Environment

Enrolment is limited to ensure a hands-on and interactive learning environment. The focus is on 'learning by doing' and will encourage active participation.

Program Curriculum

The program consists of 5 components, which encourage the building of strategic skills for developing new relationships. The core components are:

- The Macro View: Differing Perspectives
- Labour Management Relations
- Skills for Joint Relationships
- Tools for Building Joint Relationships

The fifth component is a capstone piece which allows participants to develop a model for their own workplaces, together with guidelines for implementing and maintaining it.

Instructional Staff

The instructional staff are experts in their field, and include staff and faculty members of The University of Western Ontario. In addition, renowned experts in labour relations bring a wide variety of expertise, experience and differing perspectives to the program.

