

THE CASE RECORD.

The materials bound into this volume have been collected and arranged to accompany:-

A Comparative Study of Trade Union Education for Workplace Representatives in Germany and Great Britain with specific reference to the provision by I.G. Medien for Works Councillors and M.S.F. for Shop Stewards.

'A thesis submitted for the degree of Doctor of Philosophy in the University of Liverpool.'

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Table: 1

Programme of the Socialist Workers' Party of Germany, Gotha 1875

I. Labour is the source of all wealth and culture, and since generally profitable labour is possible only through society, it is to society, that is to say to every member of it, that the total labour product belongs – given a general obligation to work – by the same right, to each according to his reasonable needs.

In present-day society the means of labour are a monopoly of the capitalist class; the resultant dependence of the working class is the cause of all forms of poverty and servitude. The emancipation of labour requires the conversion of the means of labour into the common property of society and the co-operative organisation of all labour with the universally beneficial utilisation of fair distribution of labour productivity. The emancipation of labour must be the work of the labouring class, as against which all other classes constitute a single reactionary mass.

II. Starting out from these principles, the Socialist Workers' Party of Germany aims to work by all legal means for a free state and a socialist society, to smash the iron law of wages by abolishing the system of wage labour, to end exploitation in what ever form, and to remove all social and political inequality.

The Socialist Workers' Party of Germany, while initially operating in a national context, is aware of the international character of the labour movement and determined to fulfil every obligation that the latter places upon workers in order to realise the fraternity of all mankind.

To pave the way for a solution of the social question the Socialist Workers' Party of Germany calls for the establishment of state-aided socialist producer co-operatives under the democratic control of working people. Producer co-operatives are to be created for industry and agriculture on such a scale as to give rise to the socialist organisation of all labour.

The Socialist Workers' Party calls for the following foundations of the state:

1. Universal, equal, direct suffrage with secret, compulsory voting by all citizens of twenty years and over in all elections and ballots at national and local level. Polling day must be a public holiday.
2. Direct legislation by the people. Decisions regarding war and peace by the people.
3. Universal fitness to fight. A citizen army in place of the regular army.
4. The repeal of all exceptive legislation, particularly the press laws and laws of association and combination, and of all laws restricting the free expression of opinion and freedom of thought and research.
5. Jurisdiction by the people. Free justice.
6. Universal, equal public education by the state. Compulsory schooling for all. Free instruction at all public educational institutions. Religion to be declared a private matter.

The Socialist Workers' Party of Germany calls for the following within society as at present constituted:

1. The greatest possible extension of political rights and freedoms in line with the above demands.
2. A single progressive income tax for national and local government in place of all existing taxes, particularly indirect taxes, which are a burden on the people.
3. Unrestricted right of combination.
4. A standard working day to meet the requirements of society. The prohibition of Sunday working.
5. The prohibition of child labour and all such female labour as is harmful to health and detrimental to public morals.
6. Legislation to protect the lives and health of workers. Public-health inspection of workers' dwellings. Supervision of mines, factories, and workshop and home industry by officials elected by the workers. An effective law of liability.
7. The regulation of prison labour.
8. Full autonomy for all workers' provident funds.

From the minutes of the 'Unification Conference' in Gotha, 22-27 May 1875; see Protokoll des Vereinigungs-Congresses der Sozialdemokraten Deutschlands, abgehalten zu Gotha vom 22. bis 27. Mai 1875 (Leipzig, 1875), pp54f.

Extracted from, S. Miller & H. Potthoff, *A History of German Social Democracy from 1848 to the Present*. Worcester. Berg 1986. pages 238-239.

Table: 2

The D.G.B.'s Principles of Economic Policy which were formulated at its Inaugural Congress in October 1949

The unions being the organisations of manual workers, salaried employees and civil servants work for the economic, social and cultural interests of the working population. They support an economic system which will do away with social injustice and material poverty, and offer work and a livelihood to everyone available for work. Starting from this premiss, the unions make the following basic demands:

- 1. An economic policy which, while preserving the dignity of all free men, will secure full employment for all those available for work; the most efficient use of all national productive resources, and the satisfaction of the most important national economic needs.**
- 2. Co-determination by organised labour in all economic, social and personnel aspects of management.**
- 3. Nationalization of key industries, particularly mining, iron and steel, chemicals, power, essential transport and banking.**
- 4. A fair share for all in the total national economic product, and adequate provisions for those unable to work because of age, disablement or sickness.**

Table: 3

The Principles and Objectives of I. G. Medien

1. I. G. Medien is a democratic and federal organisation. It supports the principles of democracy for state, economy, community and the wider society. It recognises the historical principle of industrial trade unionism.
2. I. G. Medien recognises as just the demand for economic, ecological, vocational, social and cultural representation both home and abroad for its members. I. G. Medien undertakes to co-operate with the D. G. B. affiliated unions to secure a society built and structured on democratic principles. It actively supports the cause of peace, understanding between nations, civil rights, disarmament and the reduction of tension.
3. In order to obtain these objectives the following are particularly important:-
 - a) To unite all potential members working in the media, including the unemployed, into an organisation of fraternity and solidarity of common interests.
 - b) To work for the extension of democratic principles in state, society and workplace. To oppose all fascist and military movements. To oppose any reductions in basic human rights, to promote all forms of democracy and participation and decision making throughout society. To oppose job losses and promote security of tenure. To promote rights of self determination in the workplace, in government and public affairs. To democratise economic planning and investment and replace market forces thinking and the power of the entrepreneurs with social ownership.
 - c) To establish the principle of the right to work.
 - d) To make and change collective agreements on pay and other issues. To make agreements on behalf of writers and authors. To seek improvements in wages, salaries and other forms of remuneration, working conditions, vocational training and to promote improvements in state and occupational pensions.
 - e) To maintain the right to take strike action and to improve the freedom to strike by fighting the lock-out weapon with the ultimate aim of preventing the lock-out being used.
 - f) To democratise society and promote freedom in the fields of information, artistic expression and speech and to be able to guarantee these freedoms. To advance participation rights in all forms and institutions of culture and education. To establish self governing art centres. To defend and protect the freedom of artistic expression and speech from the naked profit incentives of the market led media agencies. To replace the unfair privileges in education by a policy influenced by culture and artistic expression.
 - g) To obtain a framework of basic rights and independence for writers and journalists which guarantees them freedom of access and expression. To extend and promote nationally and internationally free and uncensored radio services and press. To democratise all enterprises and companies who operate press, radio, television, film audiovisual products and in other associated areas of the media.
 - h) To influence legislation, and in particular to fight for a progressive social and employment framework of law to help those working in the print industry, gives copyright to writers, gives data protection rights and will regulate hours of work. To campaign for a progressive system of taxation. To respond to the demands for adequate funds for cultural provisions.
 - i) To work for improvements in the Works Constitution Act and the Personnel Representation Act. To have full involvement in the voting procedures for, works councillors, shop stewards, consultation committees, and representatives to the supervisory board. To ensure workers participation on social insurance bodies and the representative committees.
 - j) To promote the humanisation of work. To work for the protection of the environment and oppose production methods which cause pollution. To work for improved methods of control over unsafe work practices with particular consideration for young people and women.
 - k) To realise the equal rights for men and women in the workplace, in industry and society. To promote equal access for women to the highest offices and levels of decision making in I. G. Medien. Women must be appointed at least in representative proportion to the female membership.
 - l) To represent the specific interests of immigrant workers.
 - m) To represent the specific interests of unemployed members.
 - n) To have an education service covering the union's policies and activities. Specific themes will include, trade union studies, power in society, industrial economics cultural studies, social studies and other specialised subjects. It will include all artistic mediums and other forms of expression.
 - o) To provide a journal and other publications covering public affairs and other information in the interest of the members.
 - p) To be co-determinants in the occupational education covered in technical and higher education institutions. To ensure the necessary facilities to meet these aims.
 - q) To extend the influence of the union in works councils, and in particular, promote the involvement of the shop steward in collective bargaining.
 - r) To ensure more union involvement for women and younger members.
 - s) To ensure more union involvement for salaried staff.
 - t) To represent the specific interests of freelance operators.
 - u) To provide help and assistance when needed.
 - v) To give legal protection.
 - x) To work and co-operate with international trade unions.
4. I.G.Medien is prepared to apply all its collective power to defend its principles and achieve its goals.

Translated from, I. G. Medien, *Satzung der Industriegewerkschaft Medien*; Tübingen, TC. Druck, 1990c. pages. 8-11.

Table: 4**Objects of the M.S.F. as set out in the Rulebook under Rule 5.****5. Objects**

The objects of the Union shall be:

- a) The control of industry in the interests of the community;
- b) To improve the economic and social well-being of the members and to enhance their status;
- c) To watch over, promote, organise and protect the common and individual interests of its members irrespective of ethnic origin, nationality, creed, sex or colour and to regulate relations between members and employers;
- d) To obtain representation on and affiliation to various international, national and local organisations, to ensure that the interests of the members are advocated and protected and to ensure co-operation between the Union and other trade unions;
- e) To provide financial assistance to members who have withdrawn their labour with the authority of the National Executive Council or who are locked out as a result of a dispute with their employers;
- f) To affiliate to and/or amalgamate with other appropriate organisations;
- g) To secure the wider application of science, technology and management and the improvement and extension of scientific and technical education for the benefit of the members of the Union and of society in general;
- h) To promote discussion of the ethical implications of science and technology and to encourage members to restrain the application of knowledge to purposes detrimental to mankind;
- i) To promote legislation in National Parliaments and the European Community for the benefit of the members;
- j) To pursue the furtherance of political objects to which Section 3 of the Trade Union Act 1913 applies, as defined by Rule 58 (Political Fund);
- k) To provide members with such benefits as shall hereinafter be defined and provided for by Rule including legal aid. Legal aid shall be provided at the sole discretion of the National Executive Council to members involved in accidents or incidents arising out of the course of their employment, including industrial disease and accidents involving personal injury when travelling to and from that employment;
- l) To establish and maintain funds by means of contributions, fines levies and by borrowing money and by interest on capital;
- m) To acquire, hold and dispose of any real or personal freehold or leasehold property;
- n) To make such other grants, donations or loans from the funds of the Union to such persons, bodies, institutions or organisations as may be considered necessary or desirable for any purposes specified in these Rules;
- o) To assist members who may be sick or incapacitated from work or unemployed, to assist necessitous and aged members and the widows and children or any other dependent kindred of deceased members and to make other provident benefits, as defined in Section 338 of the Income and Corporation Taxes Act 1970, to accept and manage any benevolent fund or funds which may be constituted by members or others or accumulated for these purposes or any of them;
- p) To seek to obtain redress for all broken contracts and to provide for pecuniary or other assistance to its members who may be the victims of unjust or captious or unlawful dismissal from their employment.

Table: 5

An Overview of the Role and Function of A.C.A.S.

1. It acts as a conciliator. It can intervene in industrial disputes at the request of one or more of the parties. A.C.A.S. has a long tradition of encouraging the parties to follow agreed procedures.
2. A.C.A.S. provides facilities for arbitration, mediation and investigation into trade disputes. All parties must agree to the arbitration but are not legally bound by the decision. A.C.A.S. can also refer issues up to the Central Arbitration Committee (C.A.C.). The C.A.C. has wide powers under the Employment Protection (Consolidation) Act of 1978.
3. A.C.A.S. provides an advisory service for employers' associations and the trade unions. The subject matter on what advice is sought includes, general industrial relations matters, procedures for dealing with disputes, discipline and grievances, industrial relations legislation and questions relating to employee's contracts of employment. Advice is also given on wages and payment systems, job evaluation and personnel policies.
4. A fourth duty for A.C.A.S. under Section 6 of the Employment Protection (Consolidation) Act of 1978 is the issuing of codes of practice which contain practical guidance for promoting improvements in industrial relations. To date A.C.A.S. has issued three codes. These cover, discipline practice and procedures, the disclosure of information for collective bargaining and the code for time off work for trade union activities.
5. The A.C.A.S. undertakes enquiry work aimed at improving industrial relations in particular industries, sectors or firms. Other enquiries include those made on references from the Secretary of State for Employment.
6. Since the early 1980s A.C.A.S. has been concerned to play a positive role in helping employers and trade unions to adjust their industrial relations practices and policies in order to meet the challenge of economic recession, high unemployment and new technology.

Table: 6

GEWERKSCHAFTLICHE SCHULUNG FÜR BETRIEBSRÄTE UND VERTRAUENSLEUTE

FRAGEBOGEN

Name Ihrer Gewerkschaft: _____

Ihre Stellung/Arbeit innerhalb der Gewerkschaft: _____

Dauer Ihrer Gewerkschaftsarbeit: _____

Betrieb /Beschäftigungstelle: _____

Bitte beantworten Sie die Fragen schriftlich oder kreuzen Sie die entsprechende Antwort an.

1. *Wie viel Gewerkschaftsschulungen habe Sie besucht?*

2. *Wie viel von diesen Schulungen waren Wochenschulungen?*

3. *Geben Sie kurz einige Vorteile der Wochenschulungen gegenüber den Tagessschulungen an*
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4. *Wer war der Veranstalter der Schulungen die Sie besucht haben?* D.G.B.
Einzelgewerkschaft.....
Bildungsvereinigung Arbeit u. Leben.....

5. *Hat Ihre Gewerkschaft eigene Schulungsheime oder Fortbildungseinrichtungen?* ja nein
6. *Wie wichtig ist es für die Gewerkschaften eigene Schulungsheime zu haben?* sehr wichtig
wichtig
nicht wichtig
7. *Sind Sie auch der Meinung, dass die Hauptziele der Gewerkschaftsschulungen für Betriebsräte/ Vertrauensleute folgendes beinhalten sollten:*
 - A. *Steigerung der Leistungsfähigkeit der betrieblichen und gewerkschaftlichen Interessenvertretungen?* ja nein
 - B. *Lösung der Konflikte zwischen Arbeitgebern und Arbeitnehmern an der Basis?* ja nein
 - C. *Förderung der Ausbildung von Betriebsratmitgliedern?* ja nein
 - D. *Kenntnis der Gesetze, die das Verhältnis zwischen Arbeitgebern und Arbeitnehmern regeln?* ja nein

8. *Geben Sie bitte an, in welcher Rangfolge Sie die oben genannten Ziele für wichtig halten.*
 Beispiel: Für Sie ist Ziel A am wichtigsten, also schreiben Sie hinter 1 den Buchstaben A usw.

A	B	C	D

9. *Zählen Sie einige der wichtigsten Probleme auf, die in den von Ihnen Besuchten Schulungen behandelt wurden.*

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10. *Wie zufrieden waren Sie mit den von Ihnen besuchten Fortbildungen?*

Sehr zufrieden zufrieden

Etwas zufrieden Unzufrieden

11. *Sollten sich die Fortbildungen vorrangig mit den politischen Bedingung, unter denen Konflikte zwischen Arbeitgebern und Arbeitnehmern zu lösen sind, beschäftigen?*

ja nein

12. *Geben Sie eine kurze Begründung für Ihre Antwort auf Frage 11*

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13. *Sind Sie der Meinung, das die Schulungen sich mehr mit den Gewerkschaften der übrigen EG-Staaten und deren Position zum Arbeitgeber - Arbeitnehmer verhältnis beschäftigen sollten?*

ja nein

14. *Geben Sie eine kurze Begründung für Ihre Antwort auf Frage 13*

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15. *Sehen Sie noch andere aufgaben oder Probleme*

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Vielen Dank für die Beantwortung der Fragen

8. Please rank the above aims in your order of importance, by numbering the four boxes.

1 = most important, and 4 = least important

A	B	C	D

9. Make a list of five of the key subjects that have been included on courses you have attended.

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10. What level of satisfaction do you put on the courses you have attended?

- very high
- high
- not high
- low

11. Should the courses deal more with the role of the Government in industrial relations?

- yes.....
- no

12. Give brief reasons for the way you have answered Q. 11

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13. Would you like the courses to cover more about other E. C. Countries' Trade Unions and industrial relation systems?

- yes.....
- no

14. Give brief reasons for the way you have answered Q. 13

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15. Please make other comments you may have about Trade Union education

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Thank you for answering the questions in this survey

Table: 8

I.G.Medien's Open Courses for all Union Members (5 Days Residential) in 1993 at Heidenrod – Springen, Germany.

Course Themes Offered	No. of Courses	
● Individual and collective aims	4	*
● Changing priorities and interests	4	*
● The changing society and shifts in social consciousness	3	*
● Economic forces and economic models	2	*
● Collective bargaining and strategic aims	2	*
● Historical aspects, changing emphasis and future trends	1	**
● Health and safety at work	2	
● The environment and the workplace	3	
● Information and communication technology in the workplace	1	
● Workplace psychology, understanding people and their problems	3	
● Work and leisure time in the future	3	
● The world of culture and the world of work	1	
● Effective communication and interpersonal skills (1)	6	
● Effective communication and interpersonal skills (2)	3	

Total of 38 courses.

* Modular courses

** A three week course

Table: 9

**I.G.Medien's Series 'A' Courses for Works Councillors
in 1993 at Heidenrod – Springen, Germany.
(All Courses are 5 Days Residential)**

Course Themes Offered	No. of Courses
● The Works Constitution Act in practice.	14
● The role of the works councils, co-determination and social affairs	10
● Human resources and personnel issues	6
● Staffing levels and staff planning	4
● Industrial Economics – working with databases and statistics	3
	Total of 37 courses.

Table: 10

**I.G.Medien's Series 'B' Courses for Works Councillors
in 1993 at Heidenrod – Springen, Germany.
(All Courses are 5 Days Residential)**

Course Themes Offered	No. of Courses
● Bargaining techniques and communication skill between the works council and the employer	2
● The system of legal rights for works councillors	2
● Time management, work planning - staff involvement for the works councils	2
● Human rights in the workplace, the application and recognition of rights and protection at work	2
● Regulation and control opportunities to shape work	1
● Rationalisation by electronic data equipment, personal information systems and data systems, – basic principles	4
● Rationalisation by electronic data equipment, personal information systems and data systems, – advanced course	1
● Electronic data equipment in the works council office	1
● Editing systems	1
● Data protection in the workplace	1
● Health and safety at work – ergonomics	1
● Data bank tips – information for journalists	1
● Telecommunication systems in management and production	1
● Personal information systems	1
● Modes of communication involvement for technicians	2
● Drug addicts in the workplace	2
● Career development – further and higher education	2

Total of 27 courses.

Table: 11

**I.G.Medien's Series 'C' Courses for Works Councillors
in 1993 at Heidenrod – Springen, Germany.
(All Courses are 5 Days Residential)**

Course Themes Offered	No. of Courses
● A works councillor course – newspaper and magazines	1
● A course for works councillors in paper production processes	1
● A course for works councillors representing disabled members	1
● Productivity payments – piece work, quotas and time measurement systems	1
● Influencing management decisions	1
● A course for works councillors in the private radio sector	1
● How to influence change	1
● Information and communications in the workplace news briefings and the production of house magazines and journals	2
● A course for works councillors in the film industry	1
● A course for personnel officers in the public sector of radio transmission	1
● A course on individual rights	1
	Total of 12 courses.

Table: 12

**I.G.Medien's Special Groups Courses in 1993
at Heidenrod – Springen, Germany.
(All Courses are 5 Days Residential)**

Course Themes Offered	No. of Courses
● A course for paper industry members	2
● A course for newspaper industry members	1
● A course for members who are writers or authors	1
● A course for freelance and self-employed members of the union	1
● Women and the world of work	2
● A introductory course for young members	5
● A advanced course for young members	1
● Practical skill for young members	1
● A course for salaried and supervisory grades	2
● A course for tutors	2
● A course for senior Union Officers	2
● A course for organising and administrative skills for senior Union Officers	2
	Total of 22 courses.

Table: 13

I.G.Medien Courses for Works Councillors held at Heinrich Hansen Haus, Lage-Hörste, Germany in the Period July – October 1992 (Residential)

Course Themes Offered	No. of days
July	
● Collective bargaining and industrial relations.	2
August	
● Union business in the workplace.	2
September	
● Identifying the need for staffing policies.	7
● Collective bargaining and industrial relations.	2
● Work and the ecology.	1
● Technology in the workplace.	2
● Role and responsibilities of the unions in the 90's.	2
● Union business in the workplace.	2
● Industry and culture.	2
October	
● Personnel and staffing.	7
● The works Constitution Act in practice.	2
● Collective bargaining and industrial relations.	2
● Technology in the workplace.	2
● The importance of organisation.	2
● The restrictions and limits on trade union activity in the workplace (3 courses)	2
● Industry and culture.	2
● The possibilities and limits on trade union activities.	1
Total of 19 courses.	

Table: 14

I.G.Medien Courses for Works Councillors held at Heinrich Hansen Haus, Lage-Hörste, Germany in the Period November – December 1992 (Residential)

Course Themes Offered	No. of days
November	
● The position of the salaried worker and society	7
● Selected aspects of the Works Constitution Act in practice.	5
● Health and safety at work (2 courses).	2
● Collective bargaining and industrial relations (2 courses).	3
● Work, economy and society	5
● Work, economy and society (2 courses)	2
● Technology in the workplace. (2 courses)	2
● Work and the ecology.	2
● The employment situation in Germany	2
● Workplace problems for trade unions (2 courses)	2
● Representing workers in Europe	2
● The possibilities and limits on trade union activities	2
● A course for those working in paper making	7
● Adult learning – how adults learn	7
● Work, leisure and culture – our future life style is examined	7
● Identifying key issues to qualify works councillors for their duties	2
● Trade unions and culture	2
December	
● The works Constitution Act in practice	7
● Collective bargaining and industrial relations.	
● The employment situation	2
● Representing workers interests	2
● The restrictions and limits on trade union activity in the workplace	2
● Organising information and communications – producing effective newsletters	7
● Developing young members	2
● Life and work in the year 2000	2

Total of 30 courses.

Table: 15

**I.G.Medien Courses for Women Members and Young Members
held at Heinrich Hansen Haus, Lage–Hörste, Germany in the
Period July – December 1992 (Residential)**

Course Themes Offered	No. of days
● Young people and the importance of vocational training.	1
● Young people and trade union membership.	2
● Young people and work.	7
● Youth and the problems in society (2 courses).	2
● Young people in practice.	2
● Industry, the economy and society.	2
● The family and work (5 courses).	2
● Women and the media.	2
● Women and trade union membership.	2
	Total of 14 courses.

Table: 16

**The Titles of the Courses which were put on at the
I.G.Medien's Electronic Data Equipment School,
Heinrich Hansen Haus, Lage-Hörste, Germany, during 1992.**

Group A: New Communication Technology in Industry and Society.

- * Technology and rationalisation, understanding personnel information systems. (5 courses).
- * Electronic data equipment, planning and control systems.
- * Personnel Information systems.
- * An introduction to electronic data equipment.
- * Data protection in the workplace.
- * Electronic editing systems.
- * Telecommunication systems.
- * Personnel computers for the Works Council Office.
- * Setting up electronic data equipment, health and safety, ergonomics.
- * Electronic data equipment for the Works Council Office. (2 courses).
- * Data investigating for journalists.

Group B: Vocational Further Education.

- * Working with desk top publishing. (4 courses).
- * Working with personal Computers.
- * Desk top publishing for advanced learners.
- * Working with words and windows.
- * Introduction to working with windows.
- * Introduction to telecommunications software.
- * Electronic data equipment, introductory course for women.
- * Introduction to data banks.
- * Data protection, personnel and telecommunications systems.
- * Electronic data equipment for beginners.

Group C: Courses leading to salaried staff qualifications in office and administration duties.

- * Personal word processor tools.
- * Framework 3 for advanced learners (2 courses).
- * Computer accounting.
- * Windows for advanced learners.
- * Introduction to framework 3.
- * Maximising the use of personal computers.
- * Change in office and administration duties.
- * Effective text processing with computers.

Group D: Summer School Programme.

- * How is printing done by computer?
- * Everything you wanted to know about computers.

Table: 18

Original Introduction Questionnaire

*Vorstellung d. Teilnehmer und
Situationsbericht zur Angestelltenproblematik
im Betrieb*

- *Name*
- *Tätigkeit im Betrieb*
- *Funktionen*
- *Name d. Betriebes*
- *Tarifbereich*
- *Produkte*
- *Beschäftigte Arbeiter / Angestellte*
- *Organisierte Arbeiter / Angestellte*
- *Probleme mit Angestellten
bez. d. Angestelltenarbeit*
- *Probleme z. EDV-Einsatz*
- *Probleme z. Arbeitszeit*
- *Probleme z. Flexibilisierung*
- *Sonstige Probleme i. Betrieb*
- *Erwartungshaltung z. Seminar
bez. zu Themen die unbedingt
angesprochen werden sollten*

Table: 19

Original questionnaire used on Day Three.

Thema für Arbeitsgruppen:

Welche Maßnahmen sind
notwendig und durchbar,
um die Betriebsarbeit
auf die Angestelltenbereiche
auszuweiten bzw. die
Betriebsarbeit mit Angestellten
zu verbessern?

Table: 20

**Titles of References/Learning Materials used on Day Four of
the Course for Salaried Staff (2), 22.11.1992 - 27.11.1992; Lage-
Hörste, Germany.**

1. **Eingruppierungskriterien - Lohn/Gehalt - Druckindustrie.**
I.G.Medien, Wages/salaries grouping criteria - print industry.
Stuttgart. I.G.Medien. 1992. *d*

2. **Abteilung Angestellte: Die jeweils höchsten Gehaltssätze der Gehaltsstufen im Vergleich aller Gehaltsgruppen der Gehälstarifverträge in der Druckindustrie.**
I.G.Medien, Salaried staff division: The respective highest rates of pay and wage divisions in comparison with all other groups in the Pay Agreements in the print industry.
Stuttgart. I.G.Medien. 1992. *e*

- 3 **Vorläufige Auswertung der Fragebogen zur Ermittlung der Eingruppierungen im Angestelltenbereich I.G.Medien/L.B.Z. Hessen.**
I.G.Medien, Provisional findings taken from the survey of salaried staff groupings in the I.G.Medien membership in the Federal State of Hesse.
Stuttgart. I.G.Medien.1992. *f*

4. **Entwurf: Modellrechnung Entgelt-Sätze.**
I.G.Medien, Draft: A model to determine pay rates.
Stuttgart. I.G.Medien. 1992. *g*

5. **Mitteilungen: Ergebnisse der Arbeitsgruppe Entgelt-Tarifvertrag (ETV).**
I.G.Medien, Information: Pay category details in the pay deal agreement, (PDA).
Stuttgart. I.G.Medien. 1992. *h*

6. **Entwurf für einengemeinsamen Entgelt-Tarifvertrag für Arbeiterinnen/Arbeiter und Angestellte in der Druckindustrie.**
I.G.Medien, Draft recommendations for a wages/salaried grades pay agreement for staff in the print industry.
Stuttgart. I.G.Medien. 1992. *i*

- N.B. **The above recommendation goes on to make the case that any agreement reached should only apply to I.G.Medien members.**

Table: 21

Original questionnaire used on Day Four.

Welche Gründe und Ursachen
gibt es, die zur Arbeitsverdichtung
und zum Leistungsdruck führen?

Welche Maßnahmen wären
erforderlich, um dem Leistungs-
druck entgegenzuwirken?

Table: 22

**Titles of References/Learning Materials used on Day Five of the
Course for Salaried Staff (2)**

22.11.1992 - 27.11.1992. Lage-Hörste. Germany.

1. Entwurf: Was bringt der neue Manteltarifvertrag für mich als Verlagsbeschäftigte/n ?
Information der I.G.Medien über die wichtigsten Neuerungen im neuen
Manteltarifvertrag.

I.G.Medien, Draft: What does the new General Tariff Agreement offer me as an
employee in a publishing house? Information from I.G.Medien on the most important
changes in the new General Tariff Agreement.
Munich. I.G.Medien. 1991. *b*
2. Schwarzes Brett; Personalplanungssysteme und Leistungsdruck: Mehr Personal -
Weniger Stress.

I.G.Medien, The Notice Case; Personnel management systems for pressure at work;
More care - less stress.
Stuttgart. I.G.Medien. 1991. *c*
3. Entwurf: Tarifverträgliche Regelungsmöglichkeiten zur Personalbemessung.

I.G.Medien, Draft: Possibilities for personnel arrangements under the General Tariff.
Stuttgart. I.G.Medien. 1992. *j*
4. Rahmenbetriebsvereinbarung über die Planung, die Einführung, den Einsatz und die
Änderung/Erweiterung von EDV - Systemen.

I.G.Medien, A locally agreed framework which covers, the introduction, range effects
and future use of electronic data systems.
Essen. I.G.Medien. 1991. *d*
5. Entwurf: Betriebsvereinbarung über die Anwendung und Einführung bestehender und
geplanter EDV - Anlagen.

I.G.Medien, Draft: Local agreement covering the use of and introduction to, existing
and planned electronic data equipment.
Stuttgart. I.G.Medien. 1990. *a*
6. Betriebsvereinbarung über die Einführung und Anwendung computergestützter
Personaldatenverarbeitung zwischen der dem Geschäftsleitung und dem Betriebsrat
der Schwabenverlag Aktiengesellschaft, Betrieb Ostfildern.

I.G.Medien, A local agreement between the management and the works council in the
Schwaben Co. publishing house in Ostfildern, covering the introduction and use of
computerised systems storing personal data.
Ostfildern. I.G.Medien. 1992. *k*
7. Entwurf: Betriebsvereinbarung über die Einführung und den Betrieb einer
Telfonanlage vom Typ Siemens L 180. bei der Hauptvorstandsverwaltung.

I.G.Medien, Draft: Local agreement covering the introduction and operation of a
Siemens telecommunications system HICOM L 180 at Union Headquarters.
Stuttgart. I.G.Medien. 1992. *l*

Table: 23**Titles of References/Learning Materials used on Day Six of the Course for Salaried Staff (2)****22.11.1992 - 27.11.1992. Lage-Hörste. Germany.**

1. Entwurf: Betriebsvereinbarung Gleitende Arbeitszeit bei der Hauptvorstandsverwaltung der I.G.Medien in Stuttgart.

I.G.Medien, Draft: In-house flexi-time agreement in I.E.Medien Head Quarters in Stuttgart.
Stuttgart. I.G.Medien. 1991. *e*
2. Suchtkrankheiten im Arbeitsleben; Betriebsvereinbarung zwischen der Unternehmensleitung und dem Betriebsrat des Axel Springer Verlages Hamburg.

I.G.Medien, A draft proposal, drug addicts in the workplace. A local agreement between the management and the works council of the Axel Springer publishing house in Hamburg.
Hamburg. I.G.Medien. 1992. *m*
3. Der richtige Bildschirm; Marktübersicht über strahlungsarme ergonomisch empfehlenswerte Bildschirme.

D.G.B., The right screen; an overview of the market offering low radiation and ergonomically recommended screen equipment.
Cologne. D.G.B. 1991.
4. Richtlinie Des Rates über die Mindestvorschriften bezüglich der Sicherheit und des Gesundheitsschutzes bei der Arbeit an Bildschirmgeräten.

E.E.C., Guidelines to legal minimums for health and safety when working with VDU equipment.
Brussels. E.E.C. (89/391) 1990.
5. Betriebsrat extra Ausgabe; Computer und Gesundheit.

I.G.Medien, Works council special edition; computers and health.
Hamburg. I.G.Medien. 1990. *b*
6. Fragebogen zum Gesundheitsschutz an Bildschirmarbeitsplätzen.

I.G.Medien, Questionnaire on health protection for working with V.D.U. equipment.
Stuttgart. I.G.Medien. 1991. *f*

Table: 24

M.S.F. Education Programme 1993

Planned courses at Whitehall College, Bishops Stortford, Herts.

Course Title	No. of Courses
● Lay Reps. 1.	12
● Lay Reps. 2.	6
● Communication Skills.	2
● Tackling Racism	3
● Negotiating Equal Opportunities	2
● Job Evaluation and Payment Systems	2
● Pensions. 1.	2
● Pensions. 2.	2
● Organising for Health and Safety.	6
● Women's Courses.	1
● Summer School.	2
Total of 41 courses.	

N.B. All courses run from Monday to Friday inclusive.

Table: 25

MSF Strategic Plan Six Strategic Goals

This plan outlines MSF's strategic priorities.

It sets out six strategic goals which define our vision, values and direction.

The strategic plan also identifies some of the principal objectives which we must meet as essential steps towards each of these goals

1. To turn monthly net loss of members into net gain.

Principal objectives

- increase recruitment: infill and target groups (eg women, graduate and managerial staff)
- develop our agreed target sectors: NHS, finance, voluntary and high-tech manufacturing
- develop agreed target companies
- improve retention: better administration
 better communication
 better membership services/products
- develop clear merger targets

2. To forge an industrial reputation which is second to none

Principal objectives

- elevate importance of industrial work within all levels of the union
- develop our industrial sectors strategically with lead from NOs/NACs and wide consultation
- strengthen training for FTOs and lay industrial activists
- place premium on building support for workplace reps
- develop FTO capability in field
- prioritise areas/issues where industrial progress can be made and promoted: equality issues, health and safety, pensions, legal casework
- target companies/sectors of opportunity eg in relation to impact of Unison, T&G/GMB merger
- monitor and act early on EC legal/industrial developmentsgroups

3. To establish MSF as the "unique union": forward-looking and forward-moving

Principal objectives

- become the union for skilled and professional people
- carve out and "own" areas of concern/authority: science, high-technology, investment, R&D, competitive skills/training, environment, European industrial/union developments
- challenge orthodoxy constantly: in our policy thinking, research, links with progressive causes
- develop and promote industrial breadth as strength
- forge new partnerships eg with academics, progressive industrialists, research bodies, campaign organisations
- develop structure as: parent union to professional and autonomous industrial groups
- innovate in internal openness and democracy
- champion combination issues: core industrial with profession/ethical eg in NHS, voluntary sector
- integrate equal opportunities into every aspect of work
- make MSF member-sensitive/responsive to changing demands and needs in membership services, workplace support etc

continued

4. To develop a profile which places us foremost in the minds of those within and beyond the trade union movement

Principal objectives

- raise our profile with media at national, regional and local levels
- promote our membership as economically and electorally the most significant
- campaign more effectively on fewer carefully selected issues
- apply our information-rich experience to influence opinion formers/politicians
- develop more innovative/authoritative research and policy as essential base for stronger reputation
- concentrate promotion on target industrial sectors
- strengthen participation of MSF at all levels within the wider movement
- position MSF as a radical campaigning agency in society

5. To renew our internal culture to create a single union

Principal objectives

- draw more on unique skills and expertise within our membership
- develop staff as premium resource, but no passengers
- establish a top-to-bottom culture of competence
- improve budgeting/bring in stronger financial discipline, control and accountability
- open up flows of internal information
- use more cross-departmental, project and team working
- conduct internal skills audit
- step up training and management support to do jobs
- introduce clear direction to work and greater accountability for management and performance
- focus on quality of service
- apply strategic priorities as thorough-going test of relevance to all work
- discourage all reference to ASTMS/TASS background or practices
- upgrade technology throughout union as resources permit

6. To develop our political partnership with the Labour Party in key electoral, campaign and industrial areas to help secure a change of government at the next general election

Principal objectives

- build case for political fund to replenish finances and win rebalot in 1995
- research and influence political views of target MSF members as people Labour must convert next time: skilled, professional, southern, women
- recruit Labour-supporting MSF members to party membership
- review/improve effectiveness of MSF's parliamentary work, role of parliamentary committee, sponsorship of MPs, MEPs, candidates etc
- step up support to Labour frontbenchers on industrial issues
- consolidate influence at all levels of the Party
- audit and use officers/lay members' contracts and positions in Party as channels of information/influence

Table: 26

A Members' Charter

11 Priority areas to ensure high quality service to the members

- The protection of jobs
- Workplace representation
- Health and safety
- Pay and conditions
- Communications and information
- A single union for M.S.F.
- Legal representation
- A voice in parliament
- Equal opportunities
- Employment protection and redeployment training
- The protection of long term sick and disabled

Table: 27

Recognition and Procedure Agreement

In Britain, except in health and safety matters, trade unions cannot legally require employers to deal with them. There are no positive legal rights which allow trade unions to:

- Recruit
- Organise
- represent
- Negotiate
- Take industrial action

Instead the law has historically given trade unions some protection for prosecution if they carry out these activities. Without this protection or 'immunity' trade unions could be prosecuted by the state or sued by employers.

This is the basis of the so-called 'voluntary' system of industrial relations in Britain. Relationships between employers and trade unions are normally governed by a voluntary (i.e. non-legally binding) recognition and procedure agreement.

A recognition and procedure agreement typically includes the following provisions:

- recognition by the employer that the union is the appropriate union for the employees in question to belong to
- an agreement that the employer will accept representations from and negotiate with the union and its representatives
- agreement that the union can actively recruit employees
- a grievance procedure which allows union members to raise problems with a right to representation by the union
- a right for union members to have union representation in the disciplinary procedure
- an agreement that the employer will consult with the union before making changes which affect union members
- a status quo clause by which the employer agrees not to introduce any changes which the union has objected to until the matter has been discussed under the grievance or negotiating procedure and the procedures have been exhausted
- a negotiating procedure through which disputes between the union and the employer can be resolved. Industrial action is not normally authorised by a union until the negotiating procedure is exhausted

A recognition and procedure agreement will also normally agree that the employer will provide trade union representatives with reasonable facilities to allow them to carry out their representative functions effectively.

Table: 28**Activity****Global Paints**

You are members of a branch sub-committee. You have been asked to investigate group organisation at Global Paints and to prepare a report making recommendations on how to improve group organisation. You will present your report to the next branch meeting.

Tasks:

In your committee:

1. discuss and agree how you wish to work together as a committee; you will need to agree on someone to chair the committee and on someone to act as secretary.
2. Prepare a report
 - a) identifying problems at Global Paints and
 - b) making recommendations on how to improve group organisation
3. Decide how the committee will present the report to the branch (in particular decide who will introduce the report, who will deliver the report, etc. - normally the committee chair will be responsible for chairing the branch meeting)
4. Each group will be asked to present their report to the branch meeting, take questions on the report, move acceptance of the report and conclude the meeting

Group Organisation.

Negotiating with management is the exciting and dramatic part of the rep's job, but organising the members has to come first. No matter how expert a negotiator you may be, no matter how well prepared the case, you won't get anywhere with management unless you have the members behind you.

To be effective, a union rep needs to be:

- * Well informed
- * Highly Unionised
- * Motivated
- * Involved

and this can take considerable organisation to achieve.

Case Study**Global Paints**

Read the case study below and consider how the union organisation there might be improved.

There are established MSF groups at both of Global Paint's main sites. At the factory about 70 of the 100 or so technicians, supervisors and craft workers are in membership. The TGWU organise the shop floor workers. At Head Office there are 120 members out of a potential 300; most of the members are in administrative and clerical grades, but there are a few in the computer department. There are no other unions at HQ. In addition there are a dozen members at the company's separate Research and Development Centre and a few members in the sales force, scattered amongst the company's 12 sales offices.

The union hasn't been particularly active. In the last couple of years the company's offers on pay have been settled without too much argument and without the need to involve the full time official. A number of individual cases have also been dealt with but nothing very substantial. Staff terms and conditions are dealt with in annual negotiations, the only time reps from the two sites get together.

There are three reps at the factory, one of them a health and safety rep. Group meeting, usually poorly attended, are held every two or three months in the evenings in a nearby pub.

At Head Office, the three reps are all men in administrative grades; none of the women, mainly in clerical jobs, has come forward. Group meetings are only held occasionally, usually in the canteen at lunchtime. Those that attend complain of the noise and the distracting atmosphere.

Most of the members seem apathetic and the reps are getting disheartened. "Few of the members", commented one of the reps, "can even be bothered to ask what's going on".

Table: 29

Membership Surveys

One of the ways of involving members and getting their views is to carry out a simple survey.

The steps you have to take include drawing up a questionnaire, copying it and giving it to your members. Later you have to get the questionnaires back, go through them to work out the results and then draw up a report and conclusions for further discussion within the union.

Advantages of Memberships Surveys

Some advantages are:

- * they help to involve members who find it hard to get to meetings
- * discussions inside the union branch can start with what the members said in the survey, instead of members' views being thought of last
- * meetings with management are more effective when you've got a clear picture of what members feel strongly about. You can also use a survey to check that management information is correct
- * You can use the results of a survey in a constructive way to start discussions among union members about the issues it raises.

Here are some examples of how surveys can be used.

Union meetings. What members like or dislike about them, suggestions for improving them.

Health and safety. Symptoms suffered by union members (such as dizziness, headaches, pains) and possible links to their working conditions.

Smoking. Members' attitudes to smoking bans or no-smoking areas.

Childcare. Problems faced by working parents and ideas for overcoming them.

Hours of Work. Views about part time work, job sharing, or 'flexible' hours.

Women's Health. Health problems faced by women workers and ideas about how the union could help.

Union Information. Reactions to bulletins and publicity issued by the union. What members like or dislike about the union journal or local newsletter.

Designing a Survey

- * Before you start be clear about your aims. What do you hope to achieve through the survey?
- * Start with a friendly introduction, saying how the survey will help, and stressing confidentiality. Don't ask for names unless it's really necessary.
- * Questions should be clear and straightforward.
- * Write in helpful suggestions, which should be direct and positive (e.g. "tick only one box").
- * Questions may be restricted ("tick a box") or open-ended "Say what you think about the union journal"). You need to think about how you will analyse the questionnaires - restricted questions are easier to add up, but they don't give your members a chance to say what they think. Consider using a mixture of fixed and open-ended questions.

Types of Questions	Examples
* Background details or 'profile'	sex, age, address, union
* Single choice	Yes/no
* Multiple choice	"tick on from the list"
* priorities	"put a 1 against your first choice, 2 against your second" or "tick the three statements you agree with most strongly"
* range of views	"do you agree: very strongly/strongly/partly/ not at all"
* open-ended	"write in any suggestions for improving this activity"

- * Say when this form should be returned, where to, and who is responsible for it.
- * Check your design. Show it to your colleagues to see if they understand it. Be prepared to make changes if they don't.

After the Survey

Make sure you circulate the results and let your members know what you will be doing next.

Table: 30

Union Meetings

As a union rep you will have to go to many different meetings. Some, like small meetings of members, will be informal. Others, like office/shop stewards' committees or branch meetings, will be run using formal procedures.

You need to be effective in both types of meetings and you will need to organise some meetings yourself, especially meetings of your members.

Organising Meetings

- Do you have a suitable room for the meeting?
- When should the meeting be held? Will everyone be able to attend?
- Are you clear what the meeting is about? Is every one else clear?
- How should you publicise the meeting – on the notice-board, by an announcement, by talking to individuals or by leaflet?
- Do you need an information sheet, minutes, agendas or other documents for the meeting?

Informal Meetings

Meetings of small groups of members can be run informally. But it's still important that:

- Everyone is clear what the meeting is about.
- Everyone can take part in the discussion and state their point of view.
- Enough time is allowed for questions and discussion.
- One item at a time is dealt with.
- All decisions are agreed after everyone has had the options clearly explained.
- You make notes of important ideas and all decisions

Formal Meetings

Larger, more complicated meetings need to be run more formally. The amount of control needed depends on:

- the number of people
- the amount of business
- the time available
- the extent of conflict within the meeting

Formal meetings need a chairperson. This can be a difficult job. It is the chairperson's job to balance the need to get participation, reach clear decisions and complete the business. You can judge the effectiveness of a chairperson by asking:

- Is everyone participating, or do a few experienced reps dominate?
- Does only one person speak at a time?
- Does the chairperson highlight any proposals made from the meetings?
- Does the chairperson make sure that clear decisions are made?

Table: 31

**An Example of a Survey designed on Day 2 for Presentation
on Day 5 of the M.S.F. Course for Lay Representatives Stage 1
Bishops Stortford 15-19 March 1993**

Membership Survey

This survey is being carried out by your MSF union representative at:

Our aim is to get your views on union meetings, in an attempt to improve attendances.

The survey is confidential - we are not asking your name, just the department you work in.

Please complete the questions and return by

To

Please write yours answers or place a tick in the space provided to indicate your choice.

- | | | | |
|----|---|----------------------|--------------------------|
| 1) | Are you | Male | <input type="checkbox"/> |
| | | Female | <input type="checkbox"/> |
| 2) | Which department do you work in? | Office | <input type="checkbox"/> |
| | | Stores | <input type="checkbox"/> |
| | | Engineering | <input type="checkbox"/> |
| | | Works Labs | <input type="checkbox"/> |
| | | Sales | <input type="checkbox"/> |
| 3) | Is your department represented by a union rep? | Yes | <input type="checkbox"/> |
| | | No | <input type="checkbox"/> |
| 4) | Do you attend union meetings? | Always | <input type="checkbox"/> |
| | | Occasionally | <input type="checkbox"/> |
| | | Never | <input type="checkbox"/> |
| 5) | Do you feel the information given at meetings
has any value to you? | Yes | <input type="checkbox"/> |
| | | No | <input type="checkbox"/> |
| 6) | In order of merit (1=most important, 5=least important)
What do you dislike most of your union meetings? | Out of working hours | <input type="checkbox"/> |
| | | Travel to meeting | <input type="checkbox"/> |
| | | Length of meeting | <input type="checkbox"/> |
| | | Presentation | <input type="checkbox"/> |
| | | Venue | <input type="checkbox"/> |
| 7) | Do you feel there is need for a union meeting? | Yes | <input type="checkbox"/> |
| | | No | <input type="checkbox"/> |

If no, please state why

.....

.....

- | | | | |
|----|--|-----|--------------------------|
| 8) | Do you feel you get a chance to voice
your opinions at meetings | Yes | <input type="checkbox"/> |
| | | No | <input type="checkbox"/> |

If no, please state why

.....

.....

- 9) Please make any other comments concerning union meetings
-

Date

Thank you for answering the questions in the survey.

Appendix: Excerpts from the Works Constitution Act 1972

PART I GENERAL PROVISIONS

1 Establishment of works councils

Works councils shall be elected in all establishment (Betriebe) that normally have five or more permanent employees with voting rights, including three who are eligible.

2 Status of trade unions and employers' associations

(1) The employer and the works council shall work together in a spirit of mutual trust having regard to the applicable collective agreements and in co-operation with the trade unions and employers' associations represented in the establishment for the good of the employees and of the establishment

(3) This Act shall not affect the functions of trade unions and employers' associations and more particularly the protection of their members' interests.

3 Number of members of works council

The membership of the works council shall be as follows, according to the number of employees with voting rights normally employed in the establishment

5 to 20 employees :	1 person (works representative)
21 to 50 employees:	3 members
51 to 150 employees:	5 members
151 to 300 employees:	7 members
301 to 600 employees:	9 members
601 to 1,000 employees:	11 members
1,001 to 2,000 employees:	15 members
2,001 to 3,000 employees:	19 members
3,001 to 4,000 employees:	23 members
4,001 to 5,000 employees:	27 members
5,001 to 7,000 employees:	29 members
7,001 to 9,000 employees:	31 members

In establishments employing more than 9,000 employees the number of members of the works council shall be increased by two members for every additional fraction of 3,000 employees.

10 Representation of minority groups

(1) Wage earners and salaried employees shall be represented according to their relative numerical strength whenever the works council consists of three or more members.

(2) The minimum representation of the minority group shall be as follows, according to the number of persons the group comprises:

up to 50 persons	1 representative
51 to 200 persons	2 representatives
201 to 600 persons	3 representatives
601 to 1,000 persons	4 representatives
1,001 to 3,000 persons	5 representatives
3,001 to 5,000 persons	6 representatives
5,001 to 9,000 persons	7 representatives
9,001 to 15,000 persons	8 representatives
over 15,000 persons	9 representatives

(3) Minority groups shall not be represented if the group comprises five or less employees constituting not more than one-twentieth of all the employees in the establishment.

12 Different allocation of seats

(1) The proportion of seats on the works council allocated to each group may differ from that prescribed by section 10 if both groups so decide by separate secret ballots held before the election.

(2) Persons belonging to one group may also be elected by the other group. If so, the persons so elected shall be deemed for these purposes to be members of the group that elected them. The foregoing shall also apply to substitutes.

14 Election procedure

(1) The works council shall be elected directly by secret ballot.

(5) Employees with voting rights shall be entitled to submit lists of candidates for the works council elections. Each list of candidates shall be signed by at least one-tenth of the voting members of the group, but not by less than three members with voting rights. The signatures of 100 members of the group shall be sufficient in all cases.

20 Protection against obstruction and costs of the election

(1) No person shall obstruct the election of a works council. In particular no employee shall be restricted in his right to vote or to stand for election

(2) Any attempt to influence a works council election by inflicting or threatening any unfavourable treatment or by granting or promising any advantage shall be unlawful.

(3) The costs of the election shall be borne by the employer. Any loss of working time entailed by voting or candidature or the performance of duties on the electoral board shall not give the employer a right to reduce the remuneration.

31 Attendance of trade union delegates

If one-fourth of the members or the majority of a group represented on the works council so request, a delegate of a trade union represented on the works council may be invited to attend meetings in an advisory capacity; in that case the trade union shall be notified in good time of the time of the meeting and its agenda.

37 Honorary nature of post; loss of working time

(1) The post of member of the works council shall be unpaid.

(2) The members of the works council shall be released from their work duties without loss of pay to the extent necessary for the proper performance of their functions, having regard to the size and nature of the establishment .

(4) During his term of office and for one year thereafter the remuneration of a member of the works council shall not be fixed at a lower rate than the remuneration paid to workers in a comparable position who have followed the career that is usual in the establishment. The same shall apply to general benefits granted by the employer.

(6) Subsection (2) shall apply, *mutatis mutandis*, to the attendance of training and educational courses, in so far as the knowledge imparted is necessary for the activities of the works council. In scheduling the time for attending training and educational courses the works council shall take account of the operational requirements of the establishment. It shall notify the employer in good time of the attendance of training and educational courses and of the time at which they are held. If the employer feels that the operational requirements of the establishment have not sufficiently been taken into account, he may submit the case to the conciliation committee. The award of the conciliation committee shall take the place of an agreement between the employer and the works council.

(7) Without prejudice to subsection (6), each member of the works council shall be entitled during his regular term of office to a paid release for a total of three weeks to enable him to attend training and educational courses that have been approved for this purpose by the competent central labour authority of the Land concerned after consultation with the central organisation of trade unions and employers' associations. The entitlement conferred by the preceding sentence shall be increased to four weeks where the employee is serving for the first time as a member of either the works council or a youth delegation. The second to fifth sentences of the preceding subsection shall apply.

38 Releases

(1) The minimum number of works council members to be released from their work duties shall depend on the number of employees normally employed in the establishment, as set out below:

300 to 600 employees	1 member of the works council
600 to 1,000 employees	2 members of the works council
1,001 to 2,000 employees	3 members of the works council
2,001 to 3,000 employees	4 members of the works council
3,001 to 4,000 employees	5 members of the works council
4,001 to 5,000 employees	6 members of the works council
5,001 to 6,000 employees	7 members of the works council
6,001 to 7,000 employees	8 members of the works council
7,001 to 8,000 employees	9 members of the works council
8,001 to 9,000 employees	10 members of the works council
9,001 to 10,000 employees	11 members of the works council

In establishments with more than 10,000 employees one further member of the works council shall be released for each additional fraction of 2,000 employees. Other arrangements concerning release can be made by collective or works agreement.

(2) Decisions on releases shall be taken by the works council after consultation with the employer. Due account shall be taken of the groups. If each group on the works council constitutes more than one-third of its total membership, each group shall decide on its own which of its members on the works council are to benefit from the release. The works council shall give the employer the names of the members to be released. If the employer feels that the decision is not justified by the facts he may appeal to the conciliation committee within two weeks of being notified. The award of the conciliation committee shall take the place of an agreement between the employer and the works council. If the employer does not appeal to the conciliation committee, the decision shall take effect on the expiry of the two weeks referred to above.

(3) In respect of members of the works council who have been released from their work duties for three full consecutive terms of office, the period during which their remuneration shall continue to be governed by section 37 (4) and their employment by section 37 (5) shall be extended to two years after the expiry of their term of office.

(4) Members of the works council who have been released from their work duties shall not be debarred from vocational training programmes inside or outside the establishment. Within a year Or the date on which the release comes to an end, members of the works council shall be allowed, as far as the facilities offered by the establishment permit, to take any career training normally provided for the employees of the establishment that they missed because of their release. In respect of members of the works council who were released from their work duties for three full consecutive terms of office, the period referred to in the preceding sentence shall be extended to two years.

40 Expenses of the works council and material facilities

(1) Any expenses arising out of the activities of the works council shall be defrayed by the employer.

(2) The employer shall provide to the necessary extent the premises, material facilities and office staff required for the meetings, consultations and day-to-day operation of the works council.

PART IV COLLABORATION BY EMPLOYEES AND CO-DETERMINATION

74 Principles of collaboration

(1) The employer and the works council shall meet [together at least once a month for joint conferences. They shall discuss the matters at issue with an earnest desire to reach agreement and make suggestions for settling their differences.

(2) Acts of industrial warfare between the employer and the works council shall be unlawful; the foregoing shall not apply to industrial disputes between collective bargaining parties. The employer and the works council shall refrain from activities that interfere with operations or imperil the tranquillity of the establishment. They shall refrain from any activity within the establishment in promotion of a political party; the foregoing shall not apply to dealing with matters of direct concern to the establishment or its employees in the field of collective bargaining policy, social policy and of a financial nature.

(3) The fact that an employee has assumed duties under this Act shall not restrict him in his trade union activities even where such activities are carried out in the establishment.

75 Principles for the treatment of persons employed in the establishment

(1) The employer and the works council shall ensure that every person employed in the establishment is treated in accordance with the principles of law and equity and in particular that there is no discrimination against persons on account of their race, creed, nationality, origin, political or trade union activity or convictions, or sex. They shall make sure that employees do not suffer any prejudice because they have exceeded a certain age.

(2) The employer and the works council shall safeguard and promote the untrammelled development of the personality of the employees of the establishment.

76 Conciliation committee

(1) Whenever the need arises conciliation committee shall beset up for the purpose of settling differences of opinion between the employer and the works council, central works council or combine works council. A standing conciliation committee may be established by works agreement.

(2) The conciliation committee shall be composed of assessors appointed in equal number by the employer and the works council and of an independent chairman accepted by both sides. If no agreement

can be reached on a chairman, he shall be appointed by the Labour Court. The latter shall also decide in cases where no agreement can be reached on the number of assessors.

(3) The conciliation committee shall adopt its decisions by majority vote after oral proceedings. The chairman shall not participate in the voting; in the case of a tie the discussion shall be resumed and the chairman shall participate in the subsequent vote. The decisions of the conciliation committee shall be recorded in writing, signed by the chairman and transmitted to the employer and the works council.

(5) In cases where the award of the conciliation committee takes the place of an agreement between the employer and the works council, the conciliation committee shall act at the request of either side. If one side fails to appoint members or if the members appointed by one side fail to attend after being convened in due time, the chairman and the members present shall make the award without following the procedure laid down in subsection (3). In taking its decisions the conciliation committee shall have due regard to the interests of the establishment and of the employees concerned as reasonably assessed. The employer of the works council may make an appeal to the Labour Court on the grounds that the conciliation committee has exceeded its powers, but only within two weeks of the date of notification of the award.

77 Execution of joint decisions, works agreements

(1) Agreements between the works council and the employer including those based on an award of the conciliation committee shall be executed by the employer save where otherwise agreed in particular cases. The works council shall not interfere with the management of the establishment by any unilateral action.

(2) Works agreements shall be negotiated by the works council and the employer and recorded in writing. They shall be signed by both sides, except where they are based on an award of the conciliation committee. The employer shall keep the works agreement in a suitable place in the establishment .

(3) Works agreement shall not deal with remuneration and other conditions of employment that have been fixed or are normally fixed by collective agreement. The foregoing shall not apply where a collective agreement expressly authorises the making of supplementary works agreements.

(4) Works agreements shall be mandatory and directly applicable. Any rights granted to employees under a works agreement cannot be waived except with the agreement of the works council. Such rights cannot be forfeited. Any time limits for invoking these rights shall be valid only in so far as they are laid down by collective or works agreement; the same shall apply to any reduction of the periods provided for the lapsing of rights.

(5) Unless otherwise agreed, works agreements may be terminated at three months' notice.

(6) After the expiry of a works agreement its provisions shall continue to apply until a fresh agreement is made in respect of all matters in which an award of the conciliation committee may take the place of an agreement between the employer and the works council

80 General duties

(1) The works council shall have the following general duties:

1. to see that effect is given to Acts, ordinances, safety regulations, collective agreements and works agreements for the benefit of the employees;
2. to make recommendations to the employer for action benefiting the establishment and the staff;
3. to receive suggestions from employees and the youth delegation and, if they are found to be justified, to negotiate with the employer for their implementation; it shall inform the employers concerned of the state of the negotiations and their results;
4. to promote the rehabilitation of disabled persons and other persons in particular need of assistance;
5. to prepare and organise the election of a youth delegation and to collaborate closely with the said delegation in promoting the interests of the young employees; it may invite the youth delegation to make suggestions and to state its views on various matters;
6. to promote the employment of elderly workers in the establishment;
7. to promote the integration of foreign workers in the establishment and to further understanding between them and their German colleagues.

(2) The employer shall supply comprehensive information to the works council in good time to enable it to discharge its duties under this Act. The works council shall, if it so requests, be granted access at any time to any documentation it may require for the discharge of its duties; in this connection the works committee or a committee set up in pursuance of section 28 shall be entitled to inspect the payroll showing the gross wages and salaries of the employees.

(3) In discharging its duties the works council may, after making a more detailed agreement with the

employer, call on the advice of experts in as far as the proper discharge of its duties so requires. The experts shall be bound to observe secrecy as prescribed in section 79, *mutatis mutandis*.

87 Right of Co.-determination

(1) The works council shall have a right of co-determination in the following matters in so far as they are not prescribed by legislation or collective agreement:

1. matters relating to the order by operation of the establishment and the conduct of employees in the establishment;
2. the commencement and termination of the daily working hours including breaks and the distribution of working hours among the days of the week;
3. any temporary reduction or extension of the hours normally worked in the establishment;
4. the time and place for and the form of payment of remuneration;
5. the establishment of general principles for leave arrangements and the preparation of the leave schedule as well as fixing the time at which the leave is to be taken by individual employees, if no agreement is reached between the employer and the employees concerned;
6. the introduction and use of technical devices designed to monitor the behaviour or performance of the employees;
7. arrangements for the prevention of employment accidents and occupational diseases and for the protection of health on the basis of legislation or safety regulations;
8. the form, structuring and administration of social services where scope is limited to the establishment, company or combine;
9. the assignment of and notice to vacate accommodation that is rented to employees in view of their employment relationship as well as the general fixing of the conditions for the use of such accommodation;
10. questions related to remuneration arrangements in the establishment, including in particular the establishment of principles of remuneration and the introduction and application of new remuneration methods or modification of existing methods;
11. the fixing of job and bonus rates and comparable performance related remuneration including calls coefficients (i.e. prices per time unit);
12. principles for suggestion schemes in the establishment.

(2) If no agreement can be reached on a matter covered by the preceding subsection, the conciliation committee shall make a decision. The award of the conciliation committee shall take the place of an agreement between the employer and the works council.

90 Information and consultation rights

The employer shall inform the works council in due time of any plans concerning

1. the construction, alteration or extension of works, offices and other premises belonging to the establishment;
2. technical plant;
3. working process and operations or
4. jobs

and consult the works council on the action envisaged, taking particular account of its impact on the nature of the work and the demands made on the employees. In their consultations the employer and the works council shall have regard to the established findings of ergonomics relating to the tailoring of jobs to meet human requirements.

91 Right of Co-determination

Where a special burden is imposed on the employees as a result of changes in jobs, operations or the working environment that are in obvious contradiction to the established findings of ergonomics relating to the tailoring of jobs to meet human requirements, the works council may request appropriate action to obviate, relieve or compensate for the additional stress thus imposed. If no agreement can be reached, the matter shall be decided by the conciliation committee. The award of the conciliation committee shall take the place of an agreement between the employer and the works council.

92 Manpower planning

(1) The employer shall inform the works council in full and in good time of matters relating to manpower planning including in particular present and future manpower needs and the resulting staff movements and vocational training measures and supply the relevant documentation. He shall consult the works council on the nature and extent of the action required and means of avoiding hardship.

99 Co-determination in individual staff movements

(1) In establishments normally employing more than twenty employees with voting rights the employer shall notify the works council in advance of any engagement, grading, regrading and transfer, submit to it the appropriate recruitment documents and in particular supply information on the persons concerned; he shall inform the works council of the implications of the action envisaged, supply it with the necessary supporting documentation and obtain its consent to the action envisaged. In the case of engagements and transfers the employer shall in particular supply information on the job and grading envisaged. Members of the works council shall refrain from divulging any information relating to the personal circumstances and private affairs of the employees concerned that has come to their knowledge in connection with the staff movements referred to in the first and second sentences, where such information is of confidential nature by reason of its implications or content; the second to fourth sentences of section 79 (1) shall apply, *mutatis mutandis*.

(2) The works council may refuse its consent in the following cases: .

1. if the staff movement would constitute a breach of any Act, ordinance, safety regulation or stipulation of a collective agreement or works agreement, or of a court order or official instruction;
2. if the staff movement would amount to non-observance of a guideline within the meaning of section 95;
3. if there is factual reason to assume that the staff movement is likely to result in the dismissal of or other prejudice to employees of the establishment not warranted by operational or personal reasons;
4. if the employee concerned suffers prejudice through the staff movement although this is not warranted by operational or personal reasons.

102 Co-determination in the case of dismissal

(1) The works council shall be consulted before every dismissal. The employer shall indicate to the works council the reasons for dismissal. Any notice of dismissal that is given without consulting the works council shall be null and void.

(3) The works council may oppose a routine dismissal within the time limit specified in the first sentence of subsection (2) in the following cases:

1. if the employer is selecting the employee to be dismissed disregarded or did not take sufficient account of hardship etc. or such social considerations;
2. if the dismissal would amount to non-observance of a guideline covered by section 95;
3. if the employee whose dismissal is being envisaged could be kept on at another job in the same establishment or in another establishment of the same company;
4. if the employee could be kept on after a reasonable amount of retraining or further training; or
5. if the employee could be kept on after a change in the terms of his contract and he has indicated his agreement to such change.

111 Alterations

In companies that normally have more than twenty employees with voting rights the employer shall inform the works council in full and in good time of any proposed alterations which may entail substantial prejudice to the staff or a large sector thereof and consult the works council on the proposed alterations. The following are alterations within the meaning of the first sentence:

1. reduction of operations in or closure of the whole or important departments of the establishment;
2. transfer of the whole or important departments of the establishment;
3. amalgamation with other establishments;
4. important changes in the organisation, purpose or plant of the establishment;
5. introduction of entirely new work methods and production processes.

112 Reconciliation of interests in the case of alterations; social compensation plans

(1) If the employer and the works council reach an agreement to reconcile their interests in connection with the proposed alterations, the said agreement shall be recorded in writing and signed by the employer and the works council. The foregoing shall also apply to an agreement on full or part compensation for any financial prejudice sustained by staff as a result of the proposed alterations (social compensation plan). The social compensation plan shall have the effect of a works agreement. Section 77 (3) shall not apply to the social compensation plan.

(2) If no reconciliation of interests can be achieved in connection with the proposed alterations or if no agreement is reached on the social compensation plan, the employer or the works council may apply to

the president of the Land employment office for mediation. If no such application is made or the attempt at mediation is unsuccessful, the employer or the works council may submit the case to the conciliation committee. The chairman of the conciliation committee may request the president of the Land employment office to take part in the proceedings.

(3) The employer and the works council shall submit proposals to the conciliation committee for the settlement of differences on the reconciliation of interests and the social compensation plan. The conciliation committee shall attempt to reconcile the parties. If an agreement is reached, it shall be recorded in writing and signed by the parties and the chairman .

(4) If no agreement is reached on the social compensation plan, the conciliation committee shall make a decision on the drawing up of a social compensation plan. In doing so, the conciliation committee shall take into account the social interests of the employees concerned while taking care that its decision does not place an unreasonable financial burden on the company. The award of the conciliation committee shall take the place of an agreement between the employer and the works council .

KEY POINTS FROM THE ROBERT WITT INTERVIEW MADE 4 SEPTEMBER 1991.

1. Robert Witt had an elementary school education and served an apprenticeship as a typesetter. He was drafted into the German army in 1943 when he was 17 and became a prisoner of war in March 1945. On return from the war he was eventually able to return to the print industry and his trade. From 1948 until 1968 he was to remain employed in a local print firm.
2. He had become a trade union member in the print union immediately after returning to civilian life and quickly became active when he got a permanent job. He was shop steward and a works councillor for 16 years, the last 10 of these as chairman of the works council. He also held office on the District Council and was chairman of the District Council at the time of his election as Regional Secretary in 1968. This was a full time post. His region embraced 12 districts and had a circuit of some 100 kilometres. He held that office until his retirement in 1991.
3. Robert sees the aims of the union reflecting the democratic and federal structure of I. G. Medien, that

is, that the aims and objectives have the organisation's authority and legitimacy from bottom to top. He sees the most important aims as being, extending democracy in the workplace and society, improving co-determination laws, having the right to work, improving working conditions and rates of pay, and influencing parliament and the political parties.

4. Robert sees the Nazi period as having been a disaster for trade unions who were replaced by a puppet form of unionism with no real role to protect working people. Many trade union leaders were imprisoned or killed. Free trade unions were established after 1945. Robert supports the concept of industrial unionism and his union's long aim of "one industry one union". The allied powers in occupation at the time urged the people concerned to establish industrial trade unionism.
5. The chief method of securing the aims of the union is by collective bargaining, but the use of strike action may sometimes be necessary.
6. Robert claims there is a straight connection between the aims of a union and trade union education. The union's officials need to know and understand what they are doing! This is where, he argues, the union's own

training colleges come into use, and also the relationship with the education association Arbeit und Leben (Working & Living). Robert sees education and skills development for the unions as being imperative and therefore one of the most important tasks for the union.

7. Robert sees a similar link to his previous point on education and co-determination rights. He points to the simple formula that shows that people who do not recognise their rights cannot practice or fight for those rights. Co-determination cannot work if people do not understand it! He points to the record of I. G. Medien providing a planned and ordered system of courses for stewards and works councillors. Arbeit und Leben has also made important contributions he added.
8. The union's own provision offers continuation of linked learning at local and district levels. Programmes of up to a year covering the politics of the workplace have for example been introduced at district levels in the Hildesheim area. One day and weekend courses are regular features on many subjects. Funds, bursaries and financial help from the Federal State are available for members. Paid leave is also available.

9. Robert pointed to the facilities for the members at the union's own two residential schools in Taunus and in Teutoburgerwald. Members can go on from there to full-time study in Dortmund or Frankfurt. They do however need to pass an entry examination.
10. It is not possible, Robert claims to precisely measure the level of success of the education courses put on by the union. However, he is in no doubt that their own efforts and those of Arbeit und Leben have been enormously important. The same can be said as far as the experience of other German unions are concerned.
11. Robert was himself a partaker in trade union education opportunities to get the "tools of knowledge." He claims with some pride that he kept his job until retirement which he feels he could not have done without the skills and knowledge he had gained from the trade union education courses he had attended.
12. Robert believes strongly that a framework of social legislation for working people, at least as strong as the current German standards, should be extended throughout the E.C. after 1992. He considers it to be one of the most important issues that all workers in the E.C. work under the same conditions.

KEY POINTS FROM THE DEREK DOLLARD INTERVIEW MADE ON 2 APRIL 1992.

1. Derek Dollard is employed at Imperial College of Science as a technical supervisor in reprographics. He has been a member of M.S.F. since 1980 and has held numerous lay union offices. These include, a member of the District Council, chairman of the London Area University Technicians Advisory Committee, delegate to Annual Conference and Branch Secretary. Derek is currently Branch President.
2. He sees the aims of his union being primarily the well-being of the members. Wages and salaries he feels are well at the top of the list of union priorities.
3. The union's methods for obtaining their aims are governed by the policies determined at Annual Conference and which are then subsequently passed to National Working Parties. These Working Parties will work out and then provide the union negotiators with the best plans and the most effective information to go forward on. In some cases a joint approach with other unions takes place.

4. Derek described the facilities at the union's own residential school at Whitehall College in Bishops Stortford as magnificent. The education budget is decided at each Annual Conference and also the proportion of the budget which will go to the respective Regional Councils. The allocation here will be influenced by the number of members in each region. Each region has its own education officer who is able to decide whether a member in a region can attend national courses.
5. No costs or loss of earnings are borne by M.S.F. members attending trade union courses. The union has arrangements with the employer that appropriate time-off for trade union education will be given.
6. Derek has attended many M.S.F. courses and cannot recall the precise number. He attended Lay Representatives Stage 1. Course and the Stage 2. Course some years ago and found them very helpful. He commented that M.S.F. branches have a policy of encouraging newly elected shop stewards to take a Stage 1. course as soon as possible. Specialist courses are also available and Derek has attended courses for university technicians, equal opportunities, race relations, pensions, job evaluation and communications. Some courses at Whitehall are entirely funded from the regions.

7. Derek has not attended any trade union education courses provided by the T.U.C. or the W.E.A. Because his own unions has met all his needs.
8. Derek feels the residential aspect of the trade union courses to be very helpful to effective learning. People get to know each other quicker and better and are able to discuss issues and become, as he sees it, "a community of trade unionists." There is an opportunity to exchange experiences and find things not in the learning material. It is a very good learning experience.
9. Derek sees the union's education courses being a direct reflection of the aims of the union and the decisions of Annual Conference. He feels the courses for M.S.F. are very professionally undertaken, but also feels that the lecturers also learn from the courses. He spoke of the political input at Whitehall College. Each year M.S.F. holds an Annual Summer School which is totally political in content. M.P.s (Labour) are invited to speak. A creche is provided and families are welcome to attend the Summer School.

10. Derek worked for some time in Germany under contract, for the Messerschmidt company. He had no experience of works councils. He felt that the firm was well managed, had fewer problems than here and less class distinction in things like canteens and clocking-in. He would want to know more about works councils before arguing for or against them.

11. Derek did not know of any courses that the union had put on about Europe or the Common Market. He felt Europe was a good idea for British trade unions. His union already has some contacts with European unions. He feels that in Europe we should harmonise the unions in the most beneficial way for the members - the workers.

12. Derek feels that his branch is very keen to get its members on courses. The branch has some 360 members and the take-up is good but it is the representatives who go first. Derek feels that at whatever level they are at the education that they will get at Whitehall will make them better.

KEY POINTS FROM THE STAN GREAVES INTERVIEW MADE 10 JUNE 1992.

1. Stan Greaves who is an Assistant Secretary in the Education Department of the T.U.C. sees the aims of the T.U.C. Education Programme as providing a form of study which will enable trade union representatives to carry out their function more effectively and more efficiently. There is a rigorous approach in deciding the content of the courses and the way in which they will be taught. This includes full consultation with the unions and the course tutors before piloting the courses, obtaining the endorsement from the General Council and then finally starting to run them regularly.

2. Following a major review in their education provision in 1974 the T.U.C. decided for financial and educational reasons, to use Public Education Bodies like Colleges of Further Education and the Extra Mural Departments of some universities. This has worked well over the years. Full consultation always takes place with the course tutors with the T.U.C. providing all the course materials. The tutor's role is very important in identifying the students' needs and being able to relate to those needs and teach the course accordingly. Stan sees the task of the student as being not easy. They are in the main products of the

British education system which they often feel has rejected them. It is very important for the tutor to find out where they are before trying to bring them on from that point.

3. The aims of the T.U.C. are being met claims Stan. They are regularly monitored and adjusted as and when is necessary. The educational standards are being achieved and Stan points to the reports on the quality of T.U.C. materials and courses which have come from the H.M. Inspectorate. The materials set out clear aims and the standard of tutors is as high or higher than tutors on business management courses. The students are well motivated and the reports indicate that they enjoy the course. They want to do better than they did when they were in school. Stan claims he will never be satisfied and he will keep aiming for higher successes. Sometimes there are bad reports of tutors who are unable to address the aims of the course. Such tutors will soon lose the support of the students. Stan argues that because the courses are very participative it does not mean that they are less effective or professional.

4. The T.U.C. education programme has a core content of four courses with a 10 day duration and a course mode of one day in each succeeding 10 weeks. These courses

are Stage 1. and Stage 2. Courses for trade union representatives and Stage 1. and Stage 2. Courses for safety representatives. Stan claims that the T.U.C. is moving away from too many projects and is concentrating on special needs. The T.U.C. has provided training for 150,000 safety representatives since 1978. Research by the South Bank University has shown that the T.U.C. is probably the largest and best provider of health and safety provision in Europe.

5. Stan is particularly pleased to have seen an increase in the number of women attending T.U.C. courses. He has seen the participation of women grow from eight per cent of all T.U.C. courses in 1976 to the current figure of 30 per cent. Bridging courses aimed at making women feel comfortable on the open T.U.C. courses are seen as the reason for this increase. The T.U.C. still runs women only courses.
6. The training priorities for the T.U.C. Education Department are for shop stewards and union safety representatives. However the T.U.C. also runs a number of short courses in special subjects such as Statutory Sick Pay, Pensions, Europe, Computer Awareness and the C.O.S.H.H. Regulations (Control of Substances Hazardous to Health).

7. The T.U.C. has links with the W.E.A. (Workers' Education Association) which are similar to the links with Colleges of Further and Higher Education. That is, the T.U.C. pay for the courses and provide the teaching materials and the W.E.A. provides the tutor and the premises. There is an historic link with the W.E.A. and the tutors go into the W.E.A. because they are interested in workers' education claims Stan. The W.E.A. runs about 20 per cent of the T.U.C. courses but their resources are much more restricted than those of the other venues used by the T.U.C. Stan feels that the new legislation on the funding of further and higher education may mean that the T.U.C. will use the W.E.A. more in the future.

8. The T.U.C. has residential facilities at the T.U.C. College in Hornsey. It is essentially concerned with courses for full-time officers and may soon be running N.V.Q. (National Vocational Qualifications) courses. T.U.C. tutor courses are also run from Hornsey. The cost of running residential courses for the 10 Day Programme would be far too expensive and most residential education is done by the unions themselves. Stan sees benefits in the T.U.C. courses being run in the Public Institutions because it makes trade union education part of public education.

9. The funding for the T.U.C.'s Education Programme comes almost entirely from the Government. The reason why this funding has continued from a relatively anti union administration is because the T.U.C. puts on quality work and that contributes to good industrial relations. In 1992 the T.U.C. will receive £1.6m which will be divided between competing demands for it. Stan argues that being short of funds means that they have to use their money very effectively and he is not against that concept. The T.U.C. is currently receiving additional funds for courses in the New Commonwealth from Linda Chalker's Office of Development Administration with whom the T.U.C. has very good relations. The T.U.C. has also been doing work in Albania, Romania and Poland for which funding also comes from the Foreign Office. Subject to consent from the General Council the affiliates contributions can also be used for education purposes.
10. Stan sees nothing wrong with the affiliated unions having their own residential colleges or appointing their own Education Officers at National and Regional level. They should however carefully define what education provision they want from the T.U.C. in order to avoid competing with each other.

11. Industrial unionism on the German model will not take off in this country claims Stan, but mergers mainly for financial reasons will continue to take place. The idea that a nice tidy structure that came about after the war in Germany would be very difficult to set up in this country. Works councils however are different. These are a challenge for the British Trade Union Movement which they must take or become isolated. Stan believes that the British unions and the T.U.C. will rightly insist that the representation on works councils will be by trade unionists.
12. An industrial relations legal framework which is so obvious in Germany would be welcomed by Stan. There are clear inconsistencies he argues in the deregulation of business on the one hand and the high level of regulation put on trade unions on the other.
13. Stan sees a weakening at this point in time in the link between the trade unions and the Labour Party, but he feels they will never sever the link completely. Unions will learn from Europe how to lobby governments more effectively. The T.U.C. is developing very strong links in Europe and Stan feels that this trend will continue to grow and expand.

KEY POINTS FROM THE GERHARD KIRCHGÄSSNER INTERVIEW MADE ON
27 NOVEMBER 1992.

1. Gerhard is the Salaried Grades Secretary on the Executive Committee of the Industrial Union Media. He was formerly a typesetter and has spent some twenty years in the print industry.
2. He has had substantial experience as a lay union official including being the chairman of a works council for five years before taking up full-time office which he has held for the last nine years. Since that time he has also carried out the function of a tutor on the union's education courses.
3. Gerhard explained that not many centrally organised courses are run at Heinrich Hansen Haus where most courses held there are for the North Rhine West Fallia area. At Heinrich Hansen Haus they also make lettings to the Metal Workers Union and the Banking and Insurance Union.

4. The main venue for the centrally organised courses are held in Springen in Taunus. This venue caters for the national membership including the print industry, the paper industry, newspaper publishers, the writers for radio and television and other trade groups. Works councillors and ordinary members can apply to attend courses at Springen.
5. Gerhard explained that the union has a series of course which are modular and cover the structure of society. These courses include the policies and objectives of the union and the wider aspects of society. The modular courses build on each other through five or six stages.
6. There are specific courses for works councillors which are also modular. These progress from first stages through to advanced courses into specialised areas mainly in the field of employment law. The union also puts on courses which cover current political affairs.
7. Gerhard explained that the courses do not have set or laid down teaching and learning materials or methods. These will be adopted as the course gets under way when the most suitable methods to achieve the course aims will be brought into play. The identified needs of the group are also influential in selecting teaching methods.

8. The main goal of the courses is to provide skills and knowledge for the participants and to promote their interests in trade union objectives and activities. Organising skills are important and the modular series links the issues in society to aims of the union. There is a special emphasis on the modular series for works councillors. A further goal is that of developing a strong self confidence, which means gaining an understanding of the union's policies in the broadest possible way.
9. Gerhard felt it is difficult to say if the aims are being achieved, but because the education provision has run continually since 1948 that must say something. Over the years substantial numbers of people have attended the courses and this must have had positive results. It has been shown that when in conflict situations, the works councils have been able to win through and the education programme surely helped here. However it is not possible to measure the gains precisely.
10. An important improvement for the union's education programme would be to ensure more members took up the courses, not just works councillors but all members. There is a question of insufficient capacity to do this. Perhaps the real problem is the failure of the membership to give education a high enough priority.

11. A further improvement is the need to extend the duration of the courses. Frequently the time allocation is inadequate to deal with the subject comprehensively enough.
12. Gerhard feels that there are some difficulties in getting the provision right at local level in deciding whether to run courses in-plant or in a local hotel. More should be done in this area for local organisation, for the local members, the local chairmen and the district committee members.
13. More also needs to be done for the union officers and executive committee members. There is something of a gap here and the need for skills and knowledge at this very important level should be recognised and dealt with efficiently and effectively. The gap must be closed.

Why Trade Union Political Activity is Important

The decisions of Government, both here at home and in Europe, affect:

Jobs the state of the economy
the level of unemployment
takeovers and mergers
investment, research and development

Pay the level of pay
equal pay
maternity pay
sick pay
redundancy pay
pensions

Conditions health and safety at work
the working environment
working time

Rights at Work trade union representation
unfair dismissal
equal opportunities
information and consultation

Equal Opportunities protection against discrimination
rights related to family responsibilities
equal rights for part-timers
education and training

Education and Training nursery education
schools, colleges and universities
vocational training
professional; training

Health and Community health service
Care health promotion
community care

Social Welfare industrial injury benefits
disablement benefits
unemployment benefits
child benefit
income support

MSF needs a political voice to influence these decisions

Work of MSF's Parliamentary Committee

What the Parliamentary Committee is

The MSF Parliamentary Committee consists of MSF members who are in the British Parliamentary Labour Party in both Houses of Parliament and members of the Labour group in the European Assembly. The Committee meets once a month when the House of Commons is in session. Its principal function is to consider matters referred to it by the NEC. It is acknowledged as one of the most effective lobbying and representative bodies in British Parliament.

What the Parliamentary Committee does

The parliamentary Committee raises issues in a number of ways, for example:

- *putting down questions*
- *putting Early Day Motions on Order Paper to draw attention to our policies*
- *on the floor of the house - during Second Reading, adjournment and Consolidated Fund debates*
- *in Standing Committees considering legislation*
- *at question time*
- *in Select Committees*
- *in discussions with other MPs of all parties interested in particular occupations or industries*
- *in the Parliamentary Labour Party*
- *by sponsoring Parliamentary Bills*
- *in direct approaches to Government Ministers who cannot refuse to see an MP. These often include delegations of members affected.*

The MSF Parliamentary Committee

MSF has 48 Labour MPs,
11 Labour MEPs and
6 Labour peers.

The Political Fund

What is the Political Fund?

MSF maintains a Political Fund separate from its General Fund. The contributions which MSF members make to our Political Fund are called the Political Levy. It is a small addition to the normal subscription and it is paid on a voluntary basis. Many MSF members do not, at present, pay the Political Levy, although all Members benefit from it.

How do members contribute?

Most members who do not wish to pay the Political Levy sign a form saying so. This is called 'contracting out'. Some MSF members in particular sections of the union have, however, to 'contract-in' if they wish to pay the Political Levy, which means they have to sign a form saying they want to pay it. In particular, the requirement to contract-in applies to members in the Finance Sector.

How is the Money spent?

Income from the Political Levy is spent only on the political objects of MSF. This includes:

- Sponsorship of MSF MPs and MEPs
- Lobbying and campaigning in Parliament and Europe
- Affiliation to the Labour Party
- MSF delegates to the Labour Party Conference

Why is it important?

The MSF political fund gives MSF a powerful voice in Government both here and in Europe. It gives MSF the vital resources to campaign for, and win a better quality of life for all its members, their families and the wider community.

Why do Unions have political funds?

In order to understand why unions have separate political funds it is necessary to take a brief look at trade union history and the development of laws governing how trade unions spend their money.

Before 1909 trade unions could spend their money how they wished. There was no artificial distinction between industrial work and political work. Throughout the 19th century unions had campaigned for legal changes to advance their members' interests and to establish their own legal status. By the beginning of the 20th Century unions had decided that their interests were best served by having their own independent voice in Parliament. In 1900 they formed the Labour Representation Committee which became the Labour Party in 1906. Trade union finance was vitally important to the new party, not least because MPs were not paid from public funds and had either to be financed by their party or have independent means.

However, in 1909 the Law Lords took the view in the Osborne Judgement that since political activity was not mentioned among the legitimate objectives of the unions in the Trade Union Act of 1876, it was therefore illegal. The Law Lords decided the "relations between masters and servants" were the only legal acceptable objects on which unions could spend their money.

This meant not only that contributions by the trade unions to political parties were now illegal, but also that many other activities of trade unions were illegal, in particular:

- educational benefits
- welfare benefits

were also now illegal.

The 1913 Trade Union Act

The 1913 Trade Union Act restored the right of unions to spend their money as their members wished, but it distinguished between their industrial and political activities. It defined political activity as follows:

Trade Union Act 1913 - Political Objects

- (a) on the payment of any expenses incurred either directly or indirectly by a candidate or prospective candidate for election to Parliament or to any public office, before, during, or after the election in connection with his candidature or election; or
- (b) on the holding of any meeting or the distribution of any literature or documents in support of any such candidate or prospective candidate; or
- (c) on the maintenance of any person who is a member of Parliament or who holds a public office; or
- (d) in connection with the registration of electors or the selection of a candidate for Parliament or any public office; or
- (e) on the holding of political meetings of any kind, or on the distribution of political literature or political documents of any kind, unless the main purpose of the meetings or of the distribution of the literature or documents is the furtherance of statutory objects within the meaning of this Act

Under the Trade Union Act 1913 unions had to satisfy three principles if they were to take part in what the Act defined as political activity.

- 1 All union members had to be balloted on whether the union should establish a political fund or not
- 2 All political activity as defined by the act had to be financed out of the political fund
- 3 Members had to be given a choice whether or not to contribute to the political; fund

What about Companies?

They remained free to spend money without restriction.

Company Directors:

Can contribute to political causes without consulting shareholders

Do not have to have a separate political fund

Do not have to provide contracting out

Despite legal attempts to restrict union political activities, union members voted to establish political funds, and political activity continued to be used as a means to protect and advance the interests of trade unions by their members. Indeed, without political activity many of the rights at work which we take for granted today would never have been won.

Establishing legal rights for individual workers

Union political influence has played an important part in establishing positive legal rights for individual workers and trade unions through, for example:

- Redundancy payments Act 1965
- Equal Pay Act 1970
- Unfair Dismissal Laws 1971 and 1974
- Health and Safety at Work Act 1974
- Employment Protection Act 1975
- Sex Discrimination Act 1975
- Race Relations Act 1976

Trade Union Act 1984

The Trade Union Act 1984 widened the definition of political objects previously set down by the Trade Union Act 1913. It defines political objects as follows:

The political objects to which this section applies are the expenditure of money

- a) on any contribution to the funds of, or on the payment of any expenses incurred directly or indirectly by, a political party;
- b) on the provision of any service or property for use by or on behalf of any political party;
- c) in connection with the registration of electors, the candidature of any person, the selection of any candidate or the holding of any ballot by the union in connection with any election to a political office;
- d) on the maintenance of any holder of a political office;
- e) on the holding of any conference or meeting by or on behalf of a political party or of any other meeting the main purpose of which is the transaction of business in connection with a political party;
- f) on the production, publication or distribution of any literature, document, film, sound recording or advertisement, the main purpose of which is to persuade people to vote for a political party or candidate or to persuade them not to vote for a political party or candidate.

The Trade Union Act 1984 also introduced a new requirement that all union members must be balloted every ten years on whether to keep their political fund. The founding unions of MSF held ballots in 1985/86, both of which were won by overwhelming majorities.

Affiliation to the Labour Party

British trade unions have strong historical links with the Labour Party. The struggle to win a secure legal status during the nineteenth century had shown how important it was for unions to have an effective voice in parliament. Trade unions therefore took the initiative in setting up the Labour Representation Committee which became the Labour Party in 1906.

These links with the Labour Party have been maintained throughout the twentieth century. The Labour Party's system of affiliation allows trade unions to affiliate to the Party at both national and constituency level. Affiliation gives a union the right to put forward motions and send delegates to the Labour Party Annual Conference. Branches which affiliate to constituency Labour Parties can play a similar role in local Labour Party affairs.

Because of this strong trade union presence, the Labour Party continues to be the political party which represents the aims of the trade union movement. It was the Labour Party which carried through the major social reforms after the second World War which created major advances in the field of education, housing, pensions and other welfare benefits. During the 1960s and 1970s the Labour Party's legislative programme created a 'floor of rights' for individual workers as well as providing legislative support for trade union organisation. Labour Party economic policies have always stressed the central importance of developing industrial democracy in the workplace through a strong trade union movement.

MSF affiliates to the British Labour Party nationally on behalf of those members that pay the Political Levy. Many MSF Branches also affiliate to their local constituency parties on behalf of the Political Levy-paying membership in the branch.

These decisions to affiliate are taken democratically at Annual Conference and in Branch meetings. The union also sponsors a small number of MPs. Sponsorship simply means that we make financial grants to the sponsored MP's constituency party to assist in the costs of running elections and maintaining its organisation.

MSF sponsored MPs and members of our Parliamentary Committee have been very active in supporting progressive employment legislation and in opposing harmful legislation. Their concern for the interests of our members can also be seen from their record on Select Committees and the wide range of issues taken up on behalf of the union and individual members.

This document was given out as reference material on Day Three of M.S.F. Course for Lay Reps 1. at Bishops Stortford 15-19 March 1993.

KEY POINTS FROM THE PETER BENNETT INTERVIEW MADE ON 19 MARCH
1993.

1. Peter is a post graduate in Labour Studies, and he has been associated with trade union education since 1974. This was firstly with A.S.T.M.S. and subsequently with M.S.F. after the merger with T.A.S.S. and A.S.T.M.S. He comments that there is no obvious route into trade union education.
2. There are two other education officers at Whitehall in addition to Peter, and also a National Education Officer. All Peter's education colleagues including the National Officer are women. All have had substantial experience in trade union or and, trade union research work.
3. Executive Committee members do not teach at Whitehall College, but sometimes Regional officers do. However the bulk of the planned courses is undertaken by the full-time staff. Officers are usually involved in running courses in particular companies where there are large numbers of members.

4. The College is open throughout the year except Christmas and the month of August and can take about sixty or seventy residential participants each week. There are usually about forty five courses planned each year. Other courses are put on as requested by, for example regional officers, and some of these will be put on outside the College, including the Republic of Ireland.
5. There is a direct modular approach to courses such as Lay Reps. 1. and Lay Reps. 2. and in Pensions 1. and Pensions 2. although people can do either separately so it is not strictly modular as such. However because of the range of planned courses at Whitehall, and the aims behind these courses then all of them are contributing to the development of the union's representatives.
6. Whitehall College encourages a policy within the large companies they organise, whereby the more senior representatives have a range of expertise to help and guide the younger members, and develop training strategies for them.
7. M.S.F. has several target areas for their education provision and these include members such as those in the National Health Service and the former Health Visitors Association members who are now in the union.

These members are all facing specific difficulties. There is also a priority to do more officer training. They also have a range of courses which are organised for particular companies. The provision is under constant review.

8. There is no library at Whitehall for the use of the participants, but other facilities are very good in terms of teaching, accommodation and teaching aids. In the use of teaching aids, Peter likes to adapt as he goes along and tends to rely mainly on flip charts and boards. What he may put on a board this week may be different next week on the same course. Recently the union has installed five computer terminals, these may eventually be used to train members of the union in computer skills and word processing.
9. Teaching methods at the College are essentially student centred and are based on the idea that it is very important that people are active during the learning experience.
10. It is difficult to know what the learning objectives at Whitehall are. Courses give people confidence and motivation resulting in people being more effective as representatives. In some areas we are giving people specific knowledge. There is, thinks Peter a view that they are targeting the needs of the individual representatives and also the needs of the organisation.

11. It is difficult for Whitehall to know whether they are achieving their objectives. M.S.F. has a good record and reputation for what it does, and numbers are high and people come back. It is not possible to measure what is being done. It is a feature of trade union education that there is no clear way of evaluating it, because the courses are too short. Occasionally people return and speak of their successes.
12. Some work on the European Dimension has been put on at Whitehall and European Directives have been seen as being important, as are the pensions and equal rights decisions in the European court. Whitehall ran a Summer School on Europe some time ago and the National Women's Sub Committee recently ran a week-end course on Racism in Europe.
13. M.S.F. is aware that the European Dimension is going to have an increasing impact, and an attempt will be made to develop courses in this area for union officers this October. It might not be easy to convince ordinary members that this is a priority for them. Ground work is essential in this area for them, because of the general British problem of near total ignorance of matters European.

14. Peter was not sure whether M.S.F. had a specific policy for exploring what happens in other countries but the union has very good international contacts. The union is involved in multi-national European based companies like Kodak, Philips and Allianz and conferences involving these companies have been held at Whitehall but no-one has gone to Germany to find out about works councils as far as he knew. The union has however been working with the works council of a French company operating in England over membership and recruitment.

15. Peter does not see a system of legal binding agreements as an advantage, but would like to see a legal framework which reflects the legitimacy of unions and the legal right to exist in society, and not be labelled by Margaret Thatcher as the enemy within. The system is different in countries like Sweden and Italy where the right to exist is enshrined in law, and the unions have a floor of rights.

16. Peter feels that there is a bottomless pit for trade union education, and State funds would in some ways be helpful. If unions have a legitimate role in society then there is a case for State funding, in reality the State is phasing out funding. This might make M.S.F. think harder about funds from the State. The union

subscriptions by the members are very low. The contributions from M.S.F.'s total funds is relatively small, although the union is one of the major providers of trade union education. Perhaps there will be a shift to spend more.

17. A better understanding within the union towards the role of education in union affairs would be helpful. It is not a commodity to be pulled off the shelf, it needs to be thought out and planned. Peter feels the union should expand out from the College and devise a modular approach to the officers' training to make them more organisational people. This would help the officers to develop local representatives to do more for themselves instead of passing it on to the full-time officials.

A Postscript to the Peter Bennett Interview.

After recording the interview with Peter I went along at his suggestion to see the National Education Officer Sarah Howard, who was able to give me more information to add to what Peter had provided. The total amount spent by the union on education at Whitehall College during 1991 was £640,000, of which £300,000 came from lettings with a further £100,000 coming from State funds. Sarah commented that state funds are about to be phased out. During 1992 the College ran forty one five day courses and forty two three day courses. The college also put on seventeen specialist courses including themes such as, pensions, health and safety, equal opportunities, job evaluation and communication skills. Other courses which were run at Whitehall were organised and planned with regional officers. The total number of members attending courses at Whitehall over the last three years were given as follows, in 1990 there were two thousand four hundred and fifty nine, in 1991 two thousand eight hundred and seventy two and in 1992 there were three thousand six hundred and forty.

ANALYSIS OF CURRICULUM MATERIALS.

M.D. Gall. Handbook for Evaluating and Selecting Curriculum Materials. Boston. Allyn Bacon. 1991. pages 40 - 59.

The following notes on the analysis of curriculum materials have been reproduced from the above source. They were used for the analysis and evaluation of the I.G. Medien Course for Salaried Staff (2); November 22 1992 to November 27 1992 and also for the analysis and evaluation of the M.S.F. Course for Lay Representatives (1); March 15 1993 to March 19 1993.

The nature of the teaching and learning materials for local lay representatives like works councillors and shop stewards does not make Gall's guidelines completely appropriate but they were found to be probably the most useful of the other sources which are available.

Analysis of Curriculum Materials

A mistake sometimes made in curriculum materials selection is to judge a set of materials before their purpose and organization are properly understood. This chapter stresses the importance of carefully describing the salient features of curriculum products before evaluating them and making an adoption decision. Also included is an inventory of 39 descriptive features of curriculum materials, divided up into four sections: publication and cost information; physical properties; content; and instructional properties.

The Need for an Analytic Framework

Educators sometimes make the mistake of judging a set of curriculum materials before understanding what the materials are and how they work. The recommended procedure is first to access an array of curriculum materials. Next, each set of materials should be *analyzed* accurately and in detail. The resulting analyses provide the basis for making sound judgments about each product's quality and appropriateness for a particular instructional situation. The judgmental process (called "appraisal" here) is described in Chapter 6. This chapter and Chapter 5 deal with the analytic process.

Analysis is the process of separating a whole into its component parts and examining the parts by themselves and in relation to each other. To understand how analysis applies to the selection of curriculum materials, consider what happens as we inspect new curriculum materials for the first time, for example, a textbook series. As we pick up the materials, we first look at them as a whole, and in so doing, classify them as textbooks. Then we notice such details as the title, author, and publisher. The type of cover (hardbound or soft cover) might attract our attention. As we flip through the pages of one of the books in the series, we see the publication date, intended grade level, presence of pictures interspersed with text, use of color, number of pages. In studying the Table of Contents, we obtain some idea about the topics covered in the text, and the emphasis placed on each topic. The introduction may tell us something about the author's philosophy and approach in writing the textbook. As we proceed still further in our analysis, we might ask ourselves whether supplementary materials, such as an instructor's guide, are available, and whether the publisher provides in-service workshops to help teachers use the materials properly.

The preceding example demonstrates that analysis is important for developing an understanding of curriculum materials. In current practice, only a few features of materials are noted in making selection decisions. Superficial features might receive considerable attention (e.g., cost, durability), whereas the materials' instructional properties (e.g., provision for individualization of instruction) may be overlooked completely. Therefore, educators need to be aware of the entire range of curriculum material features that can be analyzed. Most important, they should decide on an analytic framework *before* inspection of the materials begins. An analytic framework is simply an organized list of features to be described for each set of curriculum materials accessed.

Inventory of Dimensions for Analyzing Curriculum Materials

The following is a comprehensive list of 39 features that characterize curriculum materials. Each feature represents a dimension, such as cost, on which different curriculum materials can be compared. You are invited to use the descriptive labels provided in the inventory or to invent your own.

The dimensions of the inventory have been organized into four categories: (1) publication and cost information; (2) physical properties of materials; (3) content of materials; and (4) instructional properties of materials. No hierarchy of relative importance should be implied from this order of presentation, however. Table I provides a summary of the inventory.

Each dimension in the inventory is given a descriptive label and explained if necessary. Procedures for observing the dimension are stated, if appropriate. Also, a series of questions are provided to help you critically examine curriculum materials with respect to each dimension. Your own personal, critical examination is important as a check on the accuracy

and completeness of information provided by publishers and other sources. Some of the questions may seem too obvious to merit inclusion but are included here so that the list is comprehensive.

Publication and Cost Information

The first set of dimensions for analyzing curriculum materials involves cost and publication history. Information about these dimensions is sometimes included in the materials themselves (e.g., names of authors) or is provided by publishers in their advertising literature. Publishers' representatives are another source of information. Catalogs of curriculum materials (see Chapter Three) usually contain some information about cost and publication history.

Publishers may provide certain information about their materials, but may not include other information which could influence an adoption decision. For example, a publisher may provide many cost details about a particular set of materials they wish you to purchase, but fail to inform you that they shortly will be replaced with a new edition. Or you may receive information about how to purchase a curriculum product (e.g., an instructional game), but no information about whether replacement parts are available and their cost.

TABLE 1 Inventory of Dimensions for Analyzing Curriculum Materials

<p>Publication and Cost</p> <ol style="list-style-type: none"> 1. Authors 2. Cost 3. Development history 4. Edition 5. Publication date 6. Publisher 7. Purchase procedures 8. Quantity 9. Special requirements 10. Teacher training <p>Physical Properties</p> <ol style="list-style-type: none"> 11. Aesthetic Appeal 12. Components 13. Consumables 14. Durability 15. Media format 16. Quality 17. Safety 	<p>Content</p> <ol style="list-style-type: none"> 18. Approach 19. Instructional objectives 20. Instructional objectives—types 21. Issues orientation 22. Multiculturalism 23. Scope and sequence 24. Sex roles 25. Time-boundedness <p>Instructional Properties</p> <ol style="list-style-type: none"> 26. Assessment devices 27. Comprehensibility 28. Coordination with the curriculum 29. Individualization 30. Instructional effectiveness 31. Instructional patterns 32. Learner characteristics 33. Length 34. Management system 35. Motivational properties 36. Prerequisites 37. Readability 38. Role of student 39. Role of teacher
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These examples demonstrate the need to specify the date of publication and cost information about curriculum materials. If you simply rely on information provided by the publisher, you may encounter problems in purchasing and using the materials. The following list of dimensions includes questions that you may wish to ask before seeking cost and publication information.

A final bit of advice: Since publishers' representatives inadvertently make errors in quoting cost figures, you are advised to ask for official cost lists from the publisher.

- 1. Authors** *The persons responsible for the development and writing of the materials.*
- Large-scale curriculum projects may have a senior editor, who supervises a writing team.
- Who are the authors of the materials?
 - What is the institutional affiliation of the authors?
 - What is its reputation?
 - What is the professional background of the authors?
 - In the case of multiple authorship, what was the role of each author in developing the materials?
- 2. Cost** *The price that is paid for obtaining the materials from the publishers.*
- The cost for a particular set of materials may vary depending upon the conditions of purchase and the components involved.
- Is purchase the only option? Can materials (especially, films) be rented? Can rental fees be applied to the cost of purchase?
 - What is the cost of each component (e.g., textbook, instructor's guide, student workbook) in the set of materials?
 - Is there a shipping charge for the materials? Sales tax?
 - Is the cost per unit discounted if you order multiple copies? If you send immediate payment?
 - Is the cost guaranteed for a particular period of time? Are price increases likely?
 - Are less expensive versions of the materials available (e.g., hard cover versus soft cover textbooks)?
 - What is the cost of replacement parts (e.g., individual items in a simulation game) ?
 - What is the cost of installation and in-service training, if available?
 - Are there "hidden" costs, such as the need for additional resources or facilities required to use the materials?
 - How fast can the materials be sent to you after the order has been placed?
- 3. Development History** *The process and events that occurred in the development and production of the materials.*
- Information about development history sometimes yields insights into the nature and purpose of the materials.
- How was the development of the materials funded?
 - Did significant problems or events occur during the development of the materials?
 - How long was the period of development?
- 4. Edition** *The version of the curriculum materials that is to be purchased.*
- The first edition refers to the first publication of the materials. Subsequent revisions of the materials' content are numbered serially, e.g., second edition, third edition. Two editions of a set of curriculum materials can be issued at the same time, with variations: in design (e.g., an edition for regular sighted students and an edition for

visually impaired children); in content (e.g., an edition for low-reading-skill students and an edition for high-reading-skill students); and in language (e.g., an English language edition and a translation into French). The edition number or name is usually printed at the front of the materials.

- Is there more than one edition of the materials available for purchase?
- Is a new edition (revision) of the materials to be published in the near future?
- How does the current edition differ from earlier editions?
- If a new edition is to be published, will copies of the earlier materials still be available?

5. Publication Date *The date on which the materials are printed or made available for sale.*

In the case of books and audiovisual materials, only the year is indicated. In the case of newspapers, magazines, and journals, the month and day also may be indicated.

- For materials not yet released, how reliable is the publisher's anticipated date of publication?
- In the case of newspapers, magazines, and journals, how often are they published?

6. Publisher *The organization that produces and sells the materials.*

Some materials are produced by one organization, and offered for sale by another organization. The production organization is usually called the publisher, and the sales organization is called the distributor. Many free and inexpensive materials are published by business and industry.

- Is more than one organization involved in the production and sale of the materials?
- What is the official name and address of the publisher?
- If the publisher has more than one location, what is the address of the main office and of branch offices?
- What types of materials are produced by the publisher?
- Does the publisher have an established reputation?
- Is the publisher owned by another company?
- Do industry-provided materials "advertise" the products of a particular company (1)?

7. Purchase Procedures *The process of ordering materials from the publisher.*

Some materials must be ordered from a warehouse address that is different from the publisher's address. Some publishers have sales representative from whom the materials can be ordered.

- What is the address from which materials are ordered?
- How is payment for the materials to be made?
- If problems occur in ordering or receiving materials, who can be contacted?
- Must the billing order be paid immediately, or is there a specified payment period?

- 8. Quantity** *The number of copies of each component in a set of curriculum materials.*
- Some curriculum packages provide multiple copies of one or more components for classroom use.
- Does the set of materials contain a sufficient quantity of each component for the anticipated enrollment?
 - If a sufficient quantity is not provided, can additional copies be ordered?
 - Does the publisher give permission for the purchaser to reproduce extra copies of components?
- 9. Special Requirements** *Staff, equipment, or facilities not provided by the publisher and not ordinarily found in classrooms.*
- Some curriculum materials are not self-contained. For example, filmstrip loops in a curriculum kit require a projector for viewing. Spirit masters require that multiple copies be made on a duplicating machine. A science kit may describe experiments, but not provide all of the materials needed to conduct the experiments.
- Does the school need to purchase or otherwise obtain additional materials in order to implement the curriculum package? ?
 - Do the materials impose special space or staff requirements?
 - Is the special equipment or material available directly from the publisher?
 - Does the publisher require that the school district purchase consultant time or in-service training before the materials can be installed?
- 10. Teacher Training** *The extent to which teachers require special training in order to use the materials properly.*
- Some publishers include workshops for teachers as a service when their curriculum materials are purchased by a school.
- Is teacher training an extra cost, or is it included with the purchase of the materials?
 - Is the training directly relevant to the skills that teachers will need to use the materials effectively?

Physical Properties of the Materials

The second set of dimensions for analyzing curriculum materials concerns their physical construction. How many physical *components* make up the curriculum product? How *durable* are the materials? How *safe*? What is the *quality* of the materials used in the construction of the product? These are physical properties of the materials that can be analyzed and described.

Knowledge about the physical properties of materials is obviously an important factor in making adoption decisions. No one would wish to buy curriculum materials such as educational toys and science experiments that are unsafe for students to use. Durability and quality are important factors to consider in determining whether the cost of the materials is fair. A high purchase price might be justified if the materials are of high quality, durable, and reusable by successive classes of students.

Some information about the physical properties of curriculum materials can be obtained from the publisher, but most of it will come from your own inspection and judgment of the materials. For example, you will need to rely on your experience in determining whether the materials will hold up under the type of wear to which they will be subjected by your students. Judgments about quality of materials may require technical expertise. Media specialists will be especially helpful in this phase of curriculum materials analysis.

- 11. Aesthetic Appeal** *The extent to which the materials are pleasing or beautiful in appearance.*
Some materials offend the eye, ear, or other sense. Others have been constructed so that they have aesthetic appeal.
- Are any aspects of the materials unusually attractive, plain, or crude?
- 12. Components** *Each separate piece in a set of curriculum materials.*
Many materials consist of a single item, such as textbook or film. However, other materials may include several items, e.g., a textbook with accompanying instructor's manual, student workbook, and supplemental enrichment booklets. Care must be taken in determining all of the components, required or optional, in using the materials. In the case of materials such as instructional games, each and every piece of the game should be labelled as a separate component. A list of components is helpful in checking completeness of a set of materials when received from the publisher or after they have been used in class.
- Does the publisher provide a list of the package's components?
 - Must all of the components in a curriculum package be purchased? Are some optional?
 - Does the publisher use distinctive labels or descriptors to refer to components of materials?
- 13. Consumables** *Materials that are designed to be used by only one student or group of students*
The most common type of consumables is workbooks in which students write their answers.
- Is it possible to redesign consumable materials so that they can be reused?
- 14. Durability** *The extent to which the materials will hold up under conditions of use.*
The binding and cover (especially, paperback covers) of textbooks and other print materials are likely to deteriorate with heavy use. Other materials may have components vulnerable to wear.
- Does the publisher offer any guarantees or assurances concerning durability?
 - Can the materials be repaired if they become worn?
- 15. Media** *A description of the components of curriculum materials that enables one to infer the medium used, e.g., print, audio, video, graphic, mechanical object.*
One may wish to state explicitly the media format of each component in the curriculum package.
- Is more than one medium utilized in the curriculum package?
 - Does the publisher or developer provide a rationale for using a particular medium to achieve an instructional goal?

16. Quality *The fineness of the materials used to construct the curriculum package.*

Materials (e.g., paper, book bindings, pictures in a book, film stock, sound reproduction on audio cassettes) differ in quality. Better quality materials are usually more expensive than low quality materials, although this is not necessarily the case.

- Are the materials used in the construction of the curriculum product unusually high or low in quality?
- In the case of printed materials, does the paper produce a glare?

17. Safety *The extent to which the materials do not pose a hazard to the physical and emotional well being of students.*

Some materials, especially toys and games used in early childhood education, and supplies used in science classes (e.g., chemicals) may pose a hazard if used improperly.

- Does the publisher state any precautions that should be followed in using the materials?
- In the case of toys and games, have they been certified as safe by a consumer protection agency?
- Do the materials contain content that may cause an emotional upset in some students?

Content of Materials

Many educators view content as the key dimension of curriculum materials. In their view, the content is the curriculum. Content consists of the facts, concepts, generalizations, skills, and attitudes contained in the materials.

Curriculum content sometimes is analyzed and stated in terms of the materials' instructional or behavioral objectives. Another approach is to analyze and describe content in terms of scope and sequence. Also, educators may have a special interest in certain aspects of the materials' content, for example, the manner in which different ethnic groups are represented.

Contemporary curriculum developers are likely to include lists of objectives or a scope and sequence in their materials, or both. Even if all of these are available, you are advised to do your own careful study to determine what knowledge, skills, and attitudes are actually conveyed by the materials. The Table of Contents and headings in the text can be used to obtain a quick overview of content coverage.

18. Approach *The particular philosophy, values, and biases that guided the development of the materials.*

Two sets of curriculum materials may cover the same content, but differ in approach. For example, one developer may view the learner's task as "knowing" the content in the sense of being able to recall it when asked to do so. The other developer may use an inquiry approach in which students are encouraged to use the content as a springboard for making their own discoveries.

- Is the developer's approach explicitly stated in the introduction to the materials?
- * Is the developer's approach consistent with the curriculum philosophy of the school district?
- Is there anything about the developer's approach that is likely to be controversial?

- 19. Instructional Objectives** *The learning outcomes that the materials are designed to achieve.*
- Some curriculum experts believe that this is the most important aspect of materials analysis.
- Are the objectives stated in behavioral form?
 - Are the objectives explicitly stated, or must they be inferred?
 - Is there reason to think that the materials might have objectives not stated by the developer?
- 19. Instructional Objectives—Types** *The classification of instructional objectives, usually into the categories of cognition, affect, and psychomotor.*
- The taxonomies developed by Benjamin Bloom and his colleagues are often used for this purpose (2). A distinction made by some curriculum developers is to classify instructional objectives into lower cognitive and higher cognitive categories.
- Have the objectives of the materials been classified by the developers or by some other group?
- 21. Issues Orientation** *The extent to which the curriculum content reflects the uncertainty of knowledge*
- Some curriculum materials present content as a set of facts to be learned. Other materials express a sensitivity to the uncertainty that underlies much of what we claim to know. Or the curriculum content may include contrasting views of different groups on particular issues (for example, the Biblical versus the scientific explanation of creation and evolution).
- Are issues explicitly stated? Is evidence for and against each side of the issue presented?
 - Are alternative interpretations of events and artistic productions presented?
 - Do the materials contain questions designed to stimulate students to think productively about what they have read or seen or done?
- 22. Multiculturalism** *The extent to which the content of the materials reflects the perspectives and contributions of a variety of cultural and ethnic groups.*
- Some curriculum materials, in their choice of content, express a limited cultural point of view. Other materials are designed with a sensitivity to multi-cultural aspects of the curriculum content, and a sensitivity to the fact that students from different cultural backgrounds may learn differently.
- Do the developers state an awareness of multiculturalism in the design of their materials?
 - Are specific cultural and ethnic groups referred to in the materials? How often? In positive, negative, or neutral ways?

23. Scope and Sequence *The range of topics covered in a set of curriculum materials, and the order in which they are presented.*

The developer of the materials sometimes includes a chart organizing the curriculum content in terms of scope and sequence.

- Is scope and sequence explicitly stated by the materials developer? If not, can they be inferred from the table of contents or from other information in the materials?
- Is a rationale for the scope and sequence provided?

24. Sex Roles *The delineation of male and female roles in the content of the materials.*

Much of the school curriculum involves people, and one of the most salient characteristics of people is their gender. In portraying people, curriculum developers intentionally or unwittingly take a position about what is appropriate and inappropriate sex role behavior.

- If the content deals with people, are persons of both sexes represented equally in all respects—for example, in frequency of appearance as a main character, as an active or passive participant, and as workers in different occupational roles?
- Are the persons in the curriculum content portrayed in terms of stereotypic sex roles?

25. Time-Boundedness *The extent to which the materials reflect a particular point in time.*

Some curriculum materials are quickly dated. For example, a film may depict styles of dress, language, and possessions (e.g., automobiles) that are no longer current. Other materials are less timebound, for example, math curriculum materials. Date of publication provides some clue about whether the materials are outdated but delays in production may result in a recent publication date, even though the materials were developed several years earlier.

- Is time-boundedness a relevant dimension for analyzing the content of the materials?
- Is there anything about the curriculum content or style of presentation that suggests the materials are out of date, that is, not reflecting current culture and state of knowledge?

Instructional Properties of Materials

Analysis of the instructional properties of curriculum materials is not easy. It requires, first of all, that you determine the instructional design or pattern of the materials. This means an examination of the sequence of activities which students and the teacher follow as they work their way through the materials.

Analysis of instructional properties also should include an attempt to determine how and why the sequence of prescribed activities brings about the intended learning outcomes. For example, instruction in a new skill (e.g., two-place addition) sometimes follows this pattern: presentation of a model showing how the skill is used; practice examples for students to use; and an answer key so that students can check their solutions. Research has demonstrated that this sequence is effective in developing skills (3). However, it may not be effective or appropriate for other types of learning outcomes, such as the development of attitudes. The next chapter presents examples of instructional patterns and techniques for detecting them.

Certain properties of materials may have special instructional value, that is, they affect students' learning of content in the materials. Comprehensibility, length of

instruction required by the materials, and presence of motivational techniques are examples of instructional properties that probably affect learning. Readability, as one type of comprehensibility, is sufficiently important that it is discussed further in the next chapter.

26. Assessment Devices

Measures of student learning outcomes that are included in the curriculum package.

Assessment devices take a variety of forms, for example, multiple-choice tests, short answer tests, essays. Assessment devices can be used to measure progress while the student is learning the curriculum content or can be used to measure the student's final (e.g., end of course) level of learning. Some tests are intended for teacher administration; others are self-testing devices for the student's own use.

- Do the materials contain a variety of assessment devices?
- Are answer keys provided?
- Are test items related directly to the instructional objectives of the materials?
- Do the materials provide more than one version of each assessment device?
- Are test norms or standards of performance presented?

27. Comprehensibility (Clarity)

The extent to which the learner is able to understand the content of the materials.

If the presentation of content is poorly organized or has difficult vocabulary, the reader will have difficulty in learning from the materials. The comprehensibility factor interacts with learner characteristics—a particular set of materials may be incomprehensible to one learner, but not to another. Since most curriculum content is in written form, comprehensibility of text (see dimension 37—readability) is a particularly important aspect of materials analysis. Comprehensibility is not limited to text, but applies to graphics and artwork as well.

- Do the developers or publishers present evidence that the materials will be comprehensible to the students for whom they are intended?
- If the publisher presents readability data, what formulas or techniques were used to generate them?

28. Coordination with the Curriculum

The extent to which a particular set of materials needs to be considered in relation to other materials or the more general curriculum

Some curriculum materials are designed to be used in conjunction with other materials, an integrated math-science curriculum, for example. Curriculum materials also may be designed to be used in a certain type of school or class environment—for example, classrooms with activity centers, open classrooms, alternative schools.

- Are the materials compatible with other materials and the general curriculum in the setting in which they will be used?
- If the materials are designed for use at a certain grade level, must they be coordinated with the instruction that students receive at lower or higher grade levels?

- 29. Individu-
alization** The extent to which the curriculum materials are designed so that they can be used differently with different learners.
- Self-pacing, alternative activities, and content geared to different interests are the most common ways in which materials are individualized.
- What are the specific ways in which the materials can be individualized?
 - If the materials are individualized, will this pose any special management problems for the teacher?
- 30. Instruc-
tional
Effective-
ness** *The extent to which there is evidence documenting the effectiveness of the materials.*
- Developers of federally or state funded curriculum packages are likely to collect evaluation data as part of their development effort. These data may be compiled into technical reports, which are available upon request from the developer or publisher.
- If technical reports are available, do they provide data demonstrating that students learn from the materials? Do they contain data on teacher and student satisfaction in using the materials?
 - Have other districts purchased the materials, and can they be contacted to discuss their results with the materials?
- 31. Instruc-
tional
Patterns** *The form and sequence of instructional activities in a particular set of materials.*
- The form and sequence should have a rationale showing how they help the student achieve the curriculum package's objectives. Even in complex packages, the design is usually built around one or two repetitive instructional patterns. The analysis of instructional patterns is discussed further in the next chapter.
- What type of instructional pattern is incorporated in the materials?
 - What is the rationale for the instructional pattern?
- 32. Learner
Character-
istics** *The characteristics of learners for whom the materials are appropriate.*
- Learners vary significantly in aptitude, motivational level, prior learning history, handicaps, interests, and skill level (especially reading skill). Developers sometimes orient their materials to learners who have similar ability in one or more of these areas. Some materials contain options so that they can be individualized for different types of learners. Learner characteristics are discussed further in the next chapter.
- Have the materials been developed for a specific type of learners
 - Are there types of learners who may experience difficulty in using the materials?
- 33. Length** *The amount of instructional time needed to complete the activities in a set of curriculum materials.*
- The length of some materials can be measured by a simple quantitative index, such as, number of pages in a book or viewing time for a film. More difficult to measure is *instructional length*, the amount of time required by learners to achieve the materials' instructional objectives.

- Does the developer or publisher provide guidelines on the length of
- time needed by students to work through the materials?
- Are there optional activities that can be used to lengthen instruction, or deleted to shorten it?

34. Management System

Procedures to monitor and control the use of curriculum materials.

Complex curriculum packages sometimes include procedures to help teachers track students' progress through the materials. Some sophisticated management systems are computerized to give teachers daily readouts of how many units in the materials each student has mastered.

- Do the materials include charts and other record-keeping devices to help the teacher track students' progress with the materials?
- Are diagnostic-prescriptive aids provided to help the teacher pinpoint and remediate individual student difficulties in mastering the curriculum materials' content?

35. Motivational Properties

The extent to which the curriculum materials contain elements particularly designed to attract and maintain the learner's attention.

Certain instructional techniques are commonly thought to motivate the learner—a flashy introduction, surprises, questions embedded in the materials, content relevant to the learner's interests, application of the content to situations that the learner might encounter in the "real" world.

- Are the materials likely to motivate students?
- Do the materials contain motivational techniques to excite and maintain teachers' interest in using them?

36. Prerequisites

The extent to which certain prior learnings must be achieved before the curriculum materials can be used effectively.

The usual prerequisite is a certain level of skill or knowledge of content. Prerequisites are usually specified so that students need not struggle with a body of curriculum content before they are ready.

- Are prerequisites clearly specified by the developer, or can they be inferred from examining the materials?
- If students have not acquired the prerequisite knowledge, skill, etc., can they still use the materials while receiving supplementary assistance?

37. Readability

The extent to which the prose content of curriculum materials is comprehensible to the reader.

Readability has been conceptualized and measured in different ways. (Readability is a particular type of comprehensibility—see dimension 27.) Sentence length, vocabulary, and complexity of sentence structure are factors thought to determine whether a passage of prose is readable. Procedures for measuring readability are discussed in the next chapter.

- Are the materials readable by the students for whom they are intended?

38. Role of Student

The activities in which students engage as they interact with the materials and the teacher.

Some materials call for relatively passive activity, e.g., reading a book, viewing a film. Other materials more actively engage the student, e.g., completing a quiz immediately after viewing a film, playing an instructional game, participating in a discussion after reading a story.

- What are the specific types of activities in which the materials engage the student?
- Do the materials engage the student in activities that are relevant to the materials' objectives?
- Do the materials provide a mix of relatively passive and active tasks?

39. Role of Teacher

The function of a teacher as he or she uses the curriculum materials in an instructional situation.

Some materials are self-contained and require very little teacher support. Other materials require the teacher to use certain teaching methods to introduce new content or to rehearse and explain content presented in the materials.

- In using the materials, is the teacher's role more that of a manager or of an instructor?
- Do the materials require teachers to perform activities that are likely to be beyond their range of expertise?

Chapter 4 Notes

1. Concerns about industry-provided materials are well-documented in: Sheila Harty, *Hucksters in the Classroom: A Review of Industry Propaganda in Schools* (Washington, D.C.: Center for Study of Responsive Law, 1979).
2. Benjamin S. Bloom, ed., *Taxonomy of Educational Objectives: Handbook 1: Cognitive Domain* (New York: David McKay, 1956).
3. Robert Gagné and Leslie Brigg, *Principles of Instructional Design*, 2nd ed. (New York: Holt, Rinehart and Winston, 1979).

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