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Funding for Training: An annotated bibliography

by

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Funding for Training: An Annotated Bibliography

Introduction

This document results from an extensive search in libraries, the Internet and personal networks. It draws together materials about money for training, a sub-set of the wider literature on adult learning, unionism and labour markets. The specific focus is on the relationship among resources from governments, from employers, and from unions and their members. For each item, a brief summary is provided, and a couple of key quotes provided, to give the reader a flavour of the writing style.

An effort has been made to balance two streams in the literature: issues and experiences. The former emphasizes theoretical questions and debates. The latter describes arrangements in different jurisdictions for funding training programs. The types of training covered include programs for employed workers, for the unemployed, and provisions for displaced workers.

One limitation should be noted. Because government policies in Canada with regard to training are in such rapid change, this survey could not keep abreast of developments in financing in all jurisdictions. Quite simply, at the time that a reader needs the most up-to-date information on programs and funding requirements, the relevant web sites should be consulted.

While this document may be of interest to any training analyst or practitioner, it is particularly oriented to union representatives who may become involved in financing joint initiatives with employers and governments. For this purpose, a few items are highlighted with **, as particularly valuable in the authors' opinion for union representatives. For the wider literature on training policy and practice, such readers are encouraged to contact the Research Department of the Canadian Labour Congress.

Bibliography*

1. Abrahamsson, Kenneth. "Recurrent Education and the Labour Market: Changing Conceptions within Swedish Post-Compulsory Education." in Forrester, Keith and Kevin Ward, eds. *Unemployment, Education and Training: Case Studies from North America and Europe*. Sacramento: Caddo Gap Press, 1991.

This article places the case of Sweden within a post-industrial context. With specific emphasis on different kinds of adult education and training, this study examines the current and future direction of Sweden towards a knowledge-based economy with the goal of maintaining full employment.

- "As unemployment is lower than in most other countries, a larger proportion of the population is employed in the open labour market than in any other OECD country. Sweden's higher level of employment is, above all, due to the high level of economic activity among women" (277).
- "Sweden devotes 70 percent of resources to active measures- placement, training, rehabilitation, and job-creation measures - and 30 percent to cash handouts of various kinds. In most other countries, the reverse applies" (278).
- "Sweden has not opted for a system of paid educational leave, but instead created a variety of social benefits for students" (286). In addition, all members of the community, including gainfully employed adults, are entitled to "study assistance" (286).

2. Adams, R.J. and P.M. Draper and Claude Ducharme. *Education and Working Canadians: Report of the Commission of Inquiry on Educational Leave and Productivity*. Ottawa: Labour Canada, 1979.

The Commission of Inquiry on Educational Leave and Productivity reported to the federal government, and laid the groundwork for a broader study on "skill development leave" a couple of years later.

Among the recommendations in their report for removing barriers to education:

- "1. The universal application of mature admission standards; 2. Equality in the fees charged to part-time and full-time students; 3. The granting of credit for relevant experience and for courses taken at other institutions; 4. The relaxation of residency requirements; 5. The greater availability of full programs, in contrast to

* Those items accessed on the Internet during the research are identified as "online", although it is possible that some may be deleted by the time a reader seeks them. For ease of reference, the items are numbered, and are listed alphabetically by author.

occasional courses, at times and places convenient to working people; 6. The provision of counselling and assistance at convenient times and places; 7. The greater availability of financial support to part-time students; 8. The provision of more adequate financial support for low-income, under-educated adults who would return to school on a full-time basis; 9. The more extensive use of alternative educational delivery techniques; 10. The development of more certificate, diploma and degree programs built on the day release and block release principles” (226-227).

3. American Society for Training and Development. “Responding to Workplace Change.” Online. *American Society for Training and Development Website*. 1998.

The paper is based on the principle that workers must have increased knowledge levels and adaptability capacity for a high-tech economy. It outlines current private-sector and public-sector challenges and responses to this new environment in the United States, and provides policy recommendations for the Federal government. Of particular interest to our study is the section on joint labour-management training. The paper acknowledges the Wisconsin Regional Training Partnership, the Communications Workers of America, the United Auto Workers and General Motors, Sierra Pacific Power Company and the Ben Franklin Technology Center and Manufacturers Resource Center as utilizing this form of partnership. Please note, however, that this document appears to have a positive perspective on “team” approaches.

- “Traditionally, unions have responded to workplace change through collective bargaining, labor-management agreements and union-management partnerships. However, as unions continue to address issues surrounding training, retraining and career development, they have begun to form union-management partnerships that involve federal, state and community-based groups. Unions also are working with employers to enhance industry competitiveness through team efforts with management” (III.3).

4. **Anderson, John. *A Labour Agenda on Training Funding*. Training Matters Working Paper #98-01, North York, ON: Centre for Research on Work and Society, York University, 1998; Also in *Research Papers presented at the CLC National Training Conference - June 25 to 27, 1997*. Ottawa: Canadian Labour Congress, 1997.

This paper examines funding for training in Canada in an international, national and regional/provincial context. The document is broken down into the following sections: 1) Trends in Training Funding, 2) The Role of the Public Sector in Training, 3) Training Gains through Collective Bargaining, 4) Using Labour Resources on a Regional Level, 5)

International Models, 6) Conclusions.

- The author identifies the following trends in Canada's funding of training: scarce training dollars chasing scarcer jobs, deregulation and cutbacks to training, privatization and commercialization of training, devolution of funding and the Quebec 'national question' and decentralization of training funding. In terms of funding for workplace training, Canada ranks 19th out of 20 OECD countries.
- The Quebec Law Promoting Training has been in place since January 1996 and "makes it obligatory for any employer with a budget over \$250,000 for wages (by 1998) to invest the equivalent 1% of payroll in training costs" (19). However, the author identifies the problem that this law does not specify what kind of training or to whom (20).
- Regarding collective bargaining agreements, only some 480 of 1,108 contracts, as of April 1997, have paid training provisions at all, and that is for on-the-job training (22).
- The author concludes that "first, unions have to think seriously if their initiatives around training are going to strengthen or weaken the public sector, public sector unions, and jobs in the community college system... Fifth, unions have to realize that being forced into negotiating training through collective bargaining is also part of the strategy of governments and businesses to push the training issue out of the political arena, and into the business arena" (35).

5. Baldwin, John R. and Joanne Johnson. *Human Capital Development and Innovation: The Case of Training in Small and Medium Sized-Firms*. Ottawa: Statistics Canada, 1995.

This paper builds on the premise that larger firms are more likely to engage in training by doing a detailed mostly quantitative analysis of incentives for training.

6. **Benedict, Daniel. "Just to Know: A Union Education that Works." *Our Times*. February, 1986.

This article by a labour pioneer in the training field argues that workers have a need and a right to higher levels of education and training. The focus of the article is on paid educational leave programs. The author points out the role of unions in helping disadvantaged groups overcome barriers to training.

- "Our members are well served in trade union education. But their needs are broader - related to the job, to the community, and to basic human curiosity, the desire to know for its own sake" (32).
- "Italian unions were among the first to discover that winning a PEL clause was not

- enough. At first, many workers either didn't know about their right to educational leave, or didn't understand its importance to their own development" (33).
- "Trade unions can help to overcome the barriers to full participation in education and training by disadvantaged groups. In this way, effective unionism sets a pattern for other organizations, representing women, the functionally illiterate, youth, older adults, the handicapped, native peoples, and immigrant groups. It also gives a clear message to those groups among our own ranks that their needs are being reflected in the ongoing work of the union" (34).

7. Betcherman, Gordon and Norm Leckie and Kathryn McMullen. *Barriers to Employer-Sponsored Training in Canada*. Canadian Policy Research Networks Website, July 7, 1998. Online.

This study explores disincentives for employer-financed training, such as poaching, labour turnover and lack of information on the benefits for the company. Also, the paper argues that a surplus of skilled labour, expectations of government responsibility and tax-related factors are all disincentives for employer-sponsored training. The paper contains tables using 1995 statistics on the incidence of training, the size of organization that implemented a training initiative, etc.

- "Incidence of workplace training tends to be lowest in small firms and rises with firm size. (2-3).
- "In the area of training, Miller (1996) and others have documented the fact that conventional accounting frameworks cannot accurately measure the return on investments in training or in other forms of knowledge acquisition" (7).
- "Using data from the 1994 Adult Education and Training Survey, Kapsalis (1996) found that employee demand for training has a significant impact on the incidence of employer-provided training...Regression analysis indicated that employee demand for training increased the likelihood of employer-sponsored training by one-third" (8-9).

8. Betcherman, Gordon, Kathryn McMullen and Katie Davidman. *Training for the New Economy: A Synthesis Report*. Canadian Policy Research Networks Website. 1998. Online.

The first section, "Human Capital in the New Economy," details the changing nature of the economy towards a knowledge driven structure. The second section, "The Postindustrial Labour Market," outlines the changing structure of employment and employee-employer relations. The third and fourth sections, respectively, "Adult Education and Training" and "A Training Market for the New Economy," are of particular interest, dealing with issues regarding training and the workplace and provide new

“training rules.”

- “Gone are the days when governments funded, designed, and delivered training programs. The emerging role for governments is one in which they must act as broker for divergent interests, foster collaboration, created innovative credit instruments, and encourage the development of more robust information and signalling systems to guide the choices of both students and training providers” (vi).
- “Canadians with a university degree were twice as likely to report training as high school graduates and over four times as likely as those who had not completed secondary education” (39).
- The authors posit that the lack of training is a market failure (66).
- The authors present the following suggestions to increase funding for the education and training of adult Canadians: “Why could EI contributions not permit workers to accumulate training credits that could be used for the exclusive purpose of funding tuition and related living expenses?” “Why not explore the possibility of permitting charities to offer training credits as recognition for voluntary work that adds value to society?” “Existing programs for low-income Canadians provide funds to support consumption. The notion of supporting savings to build independence would be a radical shift in thinking.” “Governments have periodically considered the viability of initiatives such as educational leave plans, registered training plans within the tax system, learning accounts, and time banks for adult education and training...These are ideas whose time may have come.” Finally, the authors ask that the Canada Student Loans program change its rules in the next two years so as to “open up access to loans for people who are more economically disadvantaged” (76-77).

9. Booth, Alison L. and Dennis J. Snower. “Introduction: does the free market produce enough skills?” Alison L. Booth and Dennis J. Snower, eds. *Acquiring Skills: Market Failures, their Symptoms and Policy Responses*. Cambridge: The Centre for Economic Policy Research, 1996. 1-13.

This book provides detailed economic analyses of skills attainment. This chapter in particular deals with market failures as they relate to skills. The authors present the case for a free market in training, outline market failures in training and finally suggest that government has a role to play in responding to such market failures.

10. Bossort, Patty, Bruce Cottingham and Leslie Gardner. *Learning to Learn: Impacts of the Adult Basic Education Experience on the Lives of Participants*. Prepared for the Adult Basic Education Association of British Columbia.

This document provides proof that ABE programs have a benefit to society and the economy at large. The benefits of training and education are multifaceted and, as a result, difficult to tabulate in a linear and strictly economic fashion. From detailed personal accounts of the impacts of Adult Basic Education programs on the lives of learners, three major impacts are classified as: “1. Learning about the world (educational impacts); 2. Discovering themselves (psychological and social impacts); 3. Acting in the world (community and economic impacts).

- “Participants reported many instances of having learned concrete skills that they could apply and find helpful and practical. Even more importantly, however, is that **people have learned that they have learned**” (vii, emphasis in the original).

11. Bradford, Neil and M. Stevens. “Whither Corporatism? Political Struggles and Policy Formation in the Ontario Training and Adjustment Board.” in Thomas Dunk, Stephen McBride and Randle W. Nelson, eds. *The Training Trap: Ideology, Training and the Labour Market*. Winnipeg: Society for Socialist Studies, 1996.

This article establishes the context in which training boards were established in Canada. Specifically, it focusses on the OTAB and examines the atmosphere in which and the reasons for which this initiative failed.

- “In the context of this apparent consensus, and as part of the more general search for ‘post-Fordist’ social and economic strategies in changing global conditions,” the federal and provincial governments launched several training boards” (145).

12. Brophy, Lynn and David Robertson. “Redesigning Training in Auto Parts: From First Principles to Integrated Curriculum and Interactive Classrooms.” in Maurice C. Taylor, ed. *Workplace Education: The Changing Landscape*. Toronto: Culture Concepts Inc, 1997.

This chapter deals with the Automotive Parts Sectoral Training Council and its efforts to incorporate innovative curriculum into the training classroom. Of particular interest is the section “Back to the Future: From Labour Force Development to Labour Market Deregulation,” as it places training initiatives within the current economic context of cutbacks and deregulation.

- “APSTC training may end up as a curriculum in search of a program. The Council is currently on life support...There are two aspects to the current situation. One is federal and provincial governments that have moved quite dramatically from policies that promote labour force development policies for a harsher, more punitive labour market deregulation. The other is an employer community emboldened and made more aggressive by these changes in government policies” (126).
- “In the APSTC there was a conscious and somewhat successful effort to make training look more like education. Now it seems that education is looking like training and the labour market is looking like it did decades ago” (127).

13. Brown, Ron. *Would You Want Your Kid To Work Here? A Report On Retraining and Educational Needs of British Columbia Sawmill Workers*. A Research Project Carried Out Under a Partnership Agreement Between IWA-Canada, Local 1-3567 and Douglas College.

This paper provides the context of the forest industry in the 1990s and outlines the training needs of the workers. It documents vividly the conditions in which forestry workers operate and learn.

- “In 1991, a survey of communications skills of workers in ten sawmills found that the average level of basic skills was below the national average” (7).
- “In woods manufacturing, employment fell at an average of 2.4% each year between 1981 and 1989. In the same period, output per worker increased 8.3% each year” (34).

14. Canadian Electrical and Electronics Manufacturing Industry - Joint Human Resources Committee. *Connections for the Future: A Human Resources Strategy for the Canadian Electrical and Electronics Manufacturing Industry*. 1988.

This report is based on findings through research and subcommittees of what later evolved into the Sectoral Skills Council. Primarily, this document establishes the educational needs of the industry in a changing industrial and economical context. The report from subcommittee D on retraining and upgrading contains recommendations regarding training funds.

- The subcommittee members affirmed the following two principles in dealing with employees affected by technological change: “i) Worker dignity; and, ii)The responsibility of employers to support their employees in the period of transition following a technological change” (62).

- Subcommittee D on retraining and upgrading made several recommendations. Among them, “that a sectoral Training Fund be established, with funding to come from workers, firms, and governments...Participation in such a Fund would be voluntary...That a sectoral Training Council be established, composed equally of business and labour representatives to manage the Training Fund” (65-66).
- The subcommittee D also recommended “that the federal government, through a public awareness campaign, seek to build among individual Canadians a stronger appreciation of the importance of skill development...That the Training Fund be designed to address as directly as possible the specific obstacles and disincentives to training faced by firms and workers alike. That Employment and Immigration Canada give serious consideration to allowing ‘fee-payer’ students...to receive Unemployment Insurance benefits while taking academic upgrading or literacy training courses...That Employment and Immigration Canada consider a wider array of changes to allow UI and Training Allowance payments to better support individuals’ training activities” (69-70).

15. Canadian Grocery Producers Forum. *The Canadian Industry Today and Tomorrow: Our Common Vision*. Labour Canada and the Canadian Grocery Producers Forum, 1993.

This document provides context on the challenges facing the Canadian grocery producers industry. Of particular interest is the section on human resources which deals with the importance of training in this sector and the power of management and labour to influence the process and outcome of training.

- “When it comes to investments in employee training, for example, the effort by Canadian companies is substandard in comparison to other OECD nations” (11).
- Grocery products workers are, on the whole, younger than the rest of the industrial workforce; “half are under age 34 and more than 80% less than 49 years old” (12).

16. Canadian Labour Congress. *CLC Protocol on the Delivery of Training, Education and Employment Services*. Canadian Labour Congress Website, June 1998. Online.

This document briefly outlines CLC principles on the right to education and the role of trade unions in facilitating that process. It also commits unions to making the public education system a priority in designing and implementing training.

- “The primary responsibility for the funding of education, training and employment services must remain with governments” (6).

- “We are opposed to private-for-profit education, training and employment services” (7).

17. Canadian Labour Congress. *CLC Workplace Training Project*. Canadian Labour Congress Website, 1999. Online.

This document indicates that a union strategy is necessary to “respond to federal withdrawal from training and devolution of training and labour market programs to the provinces” (1). It asserts the need to develop a labour strategy in the following areas: 1) apprenticeship, 2) public adult education system, 3) literacy and basic skills, 4) skills training on the job and 5) employment services.

18. **Canadian Labour Congress. *Learning in Solidarity: What Unions Should Know About Getting the Money for Literacy and Basic Skills Programs*. Canadian Labour Congress, 1998.

This study provides an overview of the funding of literacy and basic skills programs from the perspective of labour unions. This paper indicates three directions for seeking funding for member programs: 1. Working with existing public education programs; 2. Utilizing government literacy programs; 3. Developing collective bargaining with employers. Finally, it outlines what services exist already at the international, national and provincial levels and outlines a “worker-centred” approach to learning.

- “When it comes to training, only 42.9% of agreements have any reference to paid training on the job...Only 30.7% of locals have training provisions which includes the employer paying courses outside of work” (23).

19. Canadian Labour Congress. *Workshop Reports: Toward A Union Vision Of Workplace Training*. CLC National Training Conference. Ottawa: 25-27 June, 1997.

This report outlines the reasons for unions to be involved in training, specific actions that need to be taken by the labour movement and recommendations following workshops at the conference. Specifically, the topics examined are apprenticeship, basic skills, employment services, public education programmes for adults and skills training. Among the recommendations:

- “that the CLC establish a standing committee dealing with apprenticeship and skills trades and with each provincial federation establish an advisory committee on such topics as national standardization and compulsory certification with an annual

- forum of at least three days” (4).
 - “Researching the range of financing models for Basic Skills programs and developing bargaining strategies and tools to help negotiate Basic Skills training” (3)
 - The most important objectives identified by this workshop were: (1) Make the development of a ‘training culture’ a political and administrative priority for the CLC. (2) Make training a collective bargaining priority. (3) Affirm support for a revitalized, democratic public education system” (3).
 - In regards to skills training, the workshop identified the following ‘doable action plans:’ “(1) To respond to membership training needs for economic opportunities and allow for individual, personal development. (2) Developing a labour agenda that takes into account: a) Workers’ view of what good training should look like. b) Opposes the right-wing corporate training agenda. c) Creates portable training standards that will be recognized in both English and French Canada. (3) Help build union strength and unity” (1).
20. Canadian Labour Market and Productivity Centre for the Canadian Grocery Producers Council. *Human Resource Study of the Canadian Grocery Products Manufacturing Industry*. Rexdale: Canadian Grocery Producers Council, 1997.

This document outlines the current status of human resources in the grocery products manufacturing industry through the results of surveys in the industry. Of particular interest is Chapter 4 “Current Human Resources Practices” which deals specifically with training programmes.

- Regarding skills needs, 70-75% of human resources managers anticipated skills increases in management, office staff, production workers and sales staff and 60% predict skills increases for maintenance staff (41).
- Older employees, women, equity group members and employees of small firms received a lower proportion of training (42).
- “The average company that reported training employees spends an average of about \$300 on training per employee annually. The smallest firms (fewer than 20 employees) reported spending twice as much per employee than did the largest firms (more than 100 employees)” (42)
- Barriers to training are identified as the following: “leaner operations make it exceedingly difficult to find the time and resources to train people in proper production procedures, much less the ‘soft-skills’ associated with semi-autonomous work teams and group problem-solving. At a time of low profitability, line managers find it very difficult to make a case that enhanced training will pay off for the company...The industry does not have a long history of joint labour-management decision-making...Training costs are similar whether an individual is full-time, full-year worker, a seasonal worker, or a part-time worker (48).

21. Canadian Task Force Report on Transition into Employment to the Canadian Labour Force Development Board. *Putting the pieces together: Towards a coherent transition system for Canada's labour force*. Ottawa: Canadian Labour Force Development Board, 1994.

This report argues that Canada needs an employment transition system. It describes the perspective of various stakeholders, including business, labour, the education and training community, women and aboriginal peoples, people with disabilities and members of visible minorities. Finally, it outlines a transitional system. Of particular interest is the section on training in chapter 4.

- “A well-integrated training system aimed at facilitating transitions into employment must: properly identify training needs, make appropriate training available, make training accessible, provide adequate and equitable financial support for training, and recognize skills acquired through training by developing occupation and skills standards” (120).
- “A solid funding base is required for a high-quality training system. The structure of the current funding system prevents access by many people in desperate need of training or retraining” (127). The following recommendations are then made:
- “#40 We recommend that the federal government restore access to the training system to people not eligible for unemployment insurance” (128).
- #41 We recommend that the federal and provincial/territorial governments fund multiyear training programs to ensure their stability over longer periods. Local boards should play a major role in identifying training needs and monitoring and evaluating training programs to ensure that these needs are being met” (128).

22. Caspar, Pierre. “France.” in Peter Jarvis, ed. *Perspectives on Adult Education and Training in Europe*. Florida: Krieger Publishing Company, 1992.

This article chronicles the history investment in adult education and training in France. It outlines current legislation which builds on state-business partnerships and examines trends for further education.

- Paid educational leave was passed on December 3, 1966, which “made further education a national obligation and it introduced the principle of a right to paid educational leave for everybody” (149).
- In 1972 obligatory participation for companies in wage bill contributions became law. “Today it is 1.2%, including 0.15% for paid educational leave and 0.3% for the further training of young job-seekers. An additional payment of 0.1% is assigned to apprenticeship. At the same time, companies allocated on average of

- 3% of their wage bill for the further education of their employees - but with significant disparities depending upon the size of the company and the different sectors of the economy in which they operated. In addition, there is a joint committee engaged in planning and implementing training schedules” (149).
- “In 1989, the state organised further educational programmes for 1.25 million people, provided about 350 million training hours and spent 18.8 billion francs” (152).
- “86,000 companies with more than 10 employees spent about 30.8 billion francs on approximately 247 million training hours on the training of 3.1 million individuals, one third of whom were women, i.e., 37.3% of their employees” (152-153).
- Local authorities and the regions spent 5 billion francs on apprenticeship and professional training in 1989 which provided educational services to 437,000 people (154).

23. Critoph, Ursule. “Background on the Training System in Canada.” *Research Papers presented at the CLC National Training Conference - June 25 to 27, 1997*. Ottawa: Canadian Labour Congress, 1997.

This article provides a brief historical background of training in Canada, from confederation to present day. The author emphasises different legislation, from the BNA Act to the Employment Insurance Act, which have had an impact on current structures of Canadian training.

24. Dassinger, Janet. “Introduction to the Issues: A CLC Survey of Union Attitudes Toward Training.” *Research Papers presented at the CLC National Training Conference - June 25 to 27, 1997*. Ottawa: Canadian Labour Congress, 1997.

This document outlines the state of training in Canada and serves as an introduction to the CLC National Training Conference. The author argues that the contribution of the labour movement to training has gone largely unrecognized and that labour must establish a common agenda for a strong voice on training issues.

- The principles embodied in the union agenda are cited as employment security; greater self esteem and confidence, and control in the workplace; access and accountability; building union pride and solidarity; training as an organizing tool (23-24).
- “Several unions warned that by not assisting members when they face layoff, we will have difficulty organizing them in the future” (24).
- Reliance on public funding is cited as a concern for unions for the following two

reasons: “first, one union pointed out that publicly financed programs almost invariably have certain criteria that distort our own goals and objectives for the training...Second, programs that are completely financed through grants are vulnerable to partial or complete funding cuts” (26).

25. Dassinger, Janet. “Training for Employability and Citizenship: Making an Essential Linkage.” in Maurice C. Taylor, ed. *Workplace Education: The Changing Landscape*. Toronto: Culture Concepts Inc, 1997.

The author utilizes examples from the United Food and Commercial Workers in order to discuss the ability of trade unions to establish social partnerships and links for training. The author discusses the role of the UFCW in sectoral councils and the potential impact of trade unions in worker-centred partnerships.

- “The trade union, unlike the employer or the state, can be open in asserting its agenda for training - to promote critical thought and further democratic participation in all spheres of working people’s lives” (72).
- “We also recognized that even in situations where good labour management relations exist, such as those between UFCW and GPMC, we have separate and distinct goals for training” (77-78).

26. Dowdell, Graham H. “Strengthening Labour Roles in Basic Skills Programming.” in Maurice C. Taylor, ed. *Workplace Education: The Changing Landscape*. Toronto: Culture Concepts Inc, 1997.

The author discusses the role of the labour movement in basic skills programs, using information and lessons from a survey on the Manitoba Federation of Labour Labour Basic Skills Project. Of particular interest is the section which explores union experiences with basic skills initiatives and highlights the differences between public, employer and union-sponsored initiatives.

- “Employer-directed initiatives were generally delivered in the workplace on company time and tended to focus on skills such as introductory computer skills and problem-solving or critical thinking...Union-based initiatives were delivered by trade union activists in sites such as union offices or residential training centres...Provincial workplace initiatives included direct delivery, on-site programs set up under Workplace Language Training which is coordinated through the Department of Culture, Heritage and Citizenship; Workplace Education which is coordinated through the Literacy and Continuing Education branch of the Department of Education and Training; and the pilot projects of the Workplace Education Manitoba Steering Committee (WEM)” (393).

27. Dunk, Thomas and Stephen McBride and Randle W. Nelsen. "Introduction." in Thomas Dunk, Stephen McBride and Randle W. Nelson, eds. *The Training Trap: Ideology, Training and the Labour Market*. Winnipeg: Society for Socialist Studies, 1996. 1-12.

This chapter introduces the book by putting the training mandate into an economic, ideological and social perspective. The current economic status of Western economies is posited as post-Keynesian which, when also considering the focus on training initiatives, has both economic and social ramifications which lead to the abandonment of the welfare state. The authors present their sceptical view of training due to the fact that governments are using training "as a substitute for an economic and industrial strategy rather than as part of one" (4).

- The authors outline two strategies with respect to training. The first is based on the principle that countries with low wage policies are undermining the ability of Western countries to compete. With this in mind, some argue "to adjust the economy upwards by moving towards diversified quality production of goods for the high-value-added end of the market. They say that training is crucial if this strategy is to be successful" (2).
- The second strategy, "it has been argued, is the only one open to European and North American economies, where high standards of living have become customary, closing off the low-wage route to competitiveness or at least making it undesirable from a political point of view" (2).
- "Thus the rhetorical focus on training as a solution to the issue of competitiveness and problems of economic growth leads to a reconsideration of Keynesian-style social policies. Indeed, the ideology of training may serve as the perfect rationale for stripping the income security programs and diverting funds towards retraining activities" (3).

28. European Centre for the Development of Vocational Training. *Evaluation of the impact of vocational training in a territorial context. The evaluation of training, human resources and regional development in rural Wales*. Berlin: European Centre for the Development of Vocational Training, 1992.

This study examines sectoral joint initiatives and establishes a model for evaluating training initiatives within the context of the case study of Wales as a rural and peripheral location.

- "In terms of transport and access, population density, economic activity and

infrastructure, (Wales) typifies many of the contemporary problems of rurality...Rural areas, particularly the more remote and peripheral, have emerged as among the most vulnerable to this catalogue of threats and least able to take advantage of parallel opportunities” (4).

29. European Centre for the Development of Vocational Training. *Country studies on the financing of vocational training with particular reference to continuing training for the gainfully employed*. Berlin: European Centre for the Development of Vocational Training, 1991.

This document examines the case of Germany on vocational training. Of particular interest is the section which describes the kinds of reimbursements employees can get from the government or firms in vocational and general learning.

- One particularly striking feature is that “under the constitution the training of workers is the task of trade and industry” (19) and therefore the state plays a subsidiary role. In 1985, 51% of continuing training was provided by firms and only 3% by trade unions

30. European Centre for the Development of Vocational Training. *The financing of adult vocational education in France*. Berlin: European Centre for the Development of Vocational Training, 1990.

This study examines which vocational training activities exist in France, which people participate and who funds these activities. The study compiles mainly information up until 1986, so is now a bit dated.

- “Following decentralization in 1983, the State transferred very wide-ranging powers over continuing vocational training and responsibilities for apprenticeship to *Regional Councils*...Firms with ten or more employees must contribute to the development of continuing training. By law, this contribution must be a minimum of 1.2% of their wagebill” (4).
- “Our premise is that vocational training takes the form of an organized and evaluated transfer of knowledge to people who, on admission to this training, are considered to be workers, i.e. looking for or occupying a job” (14).
- “While one worker out of 8 attended a training scheme in 1974, almost one out of 4 took part in a continuing training scheme in 1986” (32).
- In section V. The Training Supply: Who Produces What?, the paper indicates that the relative share of providers is the following: 17.8% Private non-profit-making training producers, 10.5% private profit-making producers of individual training, 13.1% In-house training centres of firms, 8.5% Ministry of Education

establishments, 0.7% Establishments of other Ministries, 8.4% CFA, 10.8% AFPA, 2.7% Consular organizations, 27.5% In-house training centres of the public authorities (51).

31. European Commission. *The Netherlands: Single programming document 1994-99. Objective 4: Facilitating the adaptation of workers to industrial change and to changes in production systems*. Luxembourg: European Commission, 1996.

This study includes socio-economic and macro-economic analyses of the current situation in the Netherlands in order to describe the adaptation of workers to industrial changes. It outlines a financing plan for training to cover out-of-pocket payments for participating firms and the loss of earnings for participating workers in the firms concerned by exploring public sector co-funding specifically. In addition, this study provides tables on sources for funding and the kinds of vocational training provided in 1990 and estimates for the period 1994-99.

32. Feuer, M. and H. Glick and A. Desai. "Is Firm-Sponsored Education Viable?" *Journal of Economic Behavior and Organization*. 8 (1987): 121-136.

From a strictly economic perspective, this paper challenges the notion that profit-maximizing firms cannot sponsor their employees' general training (ie. training that goes beyond job-skills) by departing from the standard human capital model. The authors also challenge the assumption that poaching is a risk to the company as it means that the firm cannot benefit from its investment in the individual.

- "If general and specific training are provided together - a common occurrence, but not one explicitly treated in the human capital literature - poaching is prevented as long as the sum of the worker's return on his specific training investment plus his share of the returns from his firm's general training investment exceeds the market value of that general training" (122).
- "It is important to understand that a worker is not insured against the risks of specific training investments merely by virtue of his prior stock of general human capital" (123).

33. Gasskov, Vladimir, ed. *Alternative Schemes of Financing Training*. Geneva: International Labour Organization, 1994.

This document examines issues related to the financing of technical and vocational education and training (TVET) through comparative analyses. It explores new schemes for financing through case studies of countries all over the world. These studies include

training agencies in Sweden, Latin American models for revenue-generating levy schemes, Japanese employment insurance schemes, etc.

- In the article “From public training agency to corporation in Sweden,” the authors chronicle the corporatisation of the AMU Group and its impact on training operations.
- “The Swedish Government pursues an active labour market policy which emphasizes mobility-stimulating measures, such as employment services, training, subsidized and sheltered employment, work adjustment, and vocational rehabilitation. The reform of 1993 will establish a single state-owned, revenue-financed, corporate concern” (38).

34. Godin, Joanne, ed. *Travailler de concert: Initiatives fédérales, provinciales et territoriales de soutien à l’alphabétisation au Canada*. Ottawa: National Literacy Secretariat, 1996.

This document combines the results of a consultation process held in Manitoba on June 4 1994 on the status of literacy in Canada, and the influence of federal funding across the provinces and territories. The document contains national, provincial and territorial literacy statistics and provides comparisons and contexts.

- “Les experts en alphabétisation interrogés dans le cadre de l’évaluation de 1995 du Secrétariat national à l’alphabétisation ont déclaré qu’avant la création du Secrétariat national à l’alphabétisation le matériel pédagogique de qualité était rare, voire inexistant” (A-9).

35. Gouvernement du Québec. *Loi favorisant le développement de la formation de la main-d’œuvre (loi 90)*. 1995.

This text lays out the legislative framework for the “law of one per cent”, which obliges Quebec employers to set aside one per cent of their payroll for training activities.

36. Gouvernement du Québec. *Règlements adoptés en vertu de la Loi favorisant le développement de la formation de la main-d’oeuvre*. 31 juillet 1997.

This text specifies the regulations governing the national training fund, established under the “law of one per cent”, including the representation of unions.

37. Gouvernement du Québec. *Guide pour la presentation d'une demande de subvention. Plan d'affectation des ressources du Fonds national de formation de la main-d'œuvre*. 1998-99.

This text gives the guidelines for applying to the national training fund for grants, drawn from the contributions of employers who failed to meet the minimum of one per cent of payroll in their own training activities.

38. **Haddow, Rodney and Andrew Sharpe. "Canada's Experiment with Labour Force Development Boards: An Introduction." in Rodney Haddow and Andrew Sharpe, eds. *Social Partnerships for Training: Canada's Experiment with Labour Force Development Boards*. Kingston: School of Policy Studies, 1997.

This article provides the context for the development of labour boards at the national and provincial level in Canada in the early 1990s. It chronicles the establishment of the national board and seven provincial boards and assesses the successes and failures experienced by each.

- "Labour was, from the outset, more enthusiastic than business about launching LFDBs with a strong mandate" (5).
- The following represents the 1996-97 budget for the boards: Nova Scotia \$150,000 - New Brunswick \$270,000 - Quebec \$67,946,000 - Ontario \$41,379,000 - Saskatchewan \$140,000 - BC 1,290,000 - Federal 2,000,000
- Can labour market corporatism survive parliamentarism and federalism? "Bureaucrats are much less used to being guided by consensual bargaining among social partners, and much more familiar with the parliamentary tradition of accountability to a responsible minister" (16).

39. **Hart, Mechthild U. *Working and Educating for Life: Feminist and International Perspectives on Adult Education*. London: Routledge, 1992.

This book deals with the sexual and international division of labour and places adult education within this context. Of particular interest is the introduction which looks at adult education and the future of work by challenging mainstream discourses.

- "Work is therefore not simply an economic strategy. It is a major nodal point for a number of fundamental relations: to the self, to others, and to nature. The structure of these relations is historically determined, and the reality of work, of its internal and external features and dynamics, and of the nature of the relations that are governed by it, therefore provides us with the most important information not only

- about the economic, but also about the social and cultural life of a society. Educational institutions or programmes fully participate in this life, as it is their primary task to train, educate and socialize competent members of society” (8).
- “Adult education seems to see its task as essentially pre-defined: to train and educate human capital...An over-emphasis on skills, and, above all, on (perceived or real) skill deficits, keeps the actual experience of work walled off” (11).

40. Hoddinott, Susan and Jim Overton. “Dismantling Public Provision of Adult Basic Education: The Anti-Literacy Politics of Newfoundland’s Literacy Campaign.” in Thomas Dunk, Stephen McBride and Randle W. Nelson, eds. *The Training Trap: Ideology, Training and the Labour Market*. Winnipeg: Society for Socialist Studies, 1996.

This article chronicles the need for and the establishment of the Newfoundland and Labrador Literacy Coalition and argues that the “public system of Adult Basic Education (ABE) has been all but dismantled” (193).

- “Canada has responded to the negative impacts of capital’s globalization by placing a large measure of responsibility on the shoulders of the victims of those impacts”(195).
- “The National Literacy Secretariat fostered the creation of provincial literacy coalitions. It did not support the work of existing Adult Basic Education associations” (200).
- “Privatization guarantees a hierarchical system: some people will have access to a quality education on a user-pay basis, others will be left to their fate” (215).
- “The implications of all this for Canada’s rural areas and for poor and isolated regions and people are obvious: without state intervention and a commitment to universal access, these people will be denied any opportunity to upgrade their education” (215).

41. Hoddinott, Susan. *something to think about please think about this: Report on a National Study of Access to Adult Basic Education Programs and Services in Canada*. Ottawa: Ottawa Board of Education, 1998.

This report deals with access to basic education programs and services in Canada, largely based on results from local surveys in different regions across the country. Of particular interest is the section in Chapter 5 which deals with how students in Adult Basic Education programs fund their schooling. This section indicates the emotional toll on students who must struggle to pay for their education and highlights the different kinds of difficulties experienced by disadvantaged groups.

- “How, despite all of these problems, do my students manage to concentrate in class? It is a miracle of strength, will, determination and resourcefulness, and I have limitless admiration for them. If all of the energy that is spent on surviving were invested in their education, imagine the results in our literacy classes!” (97).
- A woman in her fifties was told by her social worker, “‘If you can go to school, you can go to work.’ Not only wouldn’t he let her come without giving her any extra (support), but (he) threatened to cut her off completely from welfare” (109).
- “At Site B, mothers were obliged to spend the lunch period with their children and to pick them up five minutes before their own class officially ended. ‘Most of the students have (only) half-day daycare for their kids so, as soon as their classes finish, they have to accompany their kid home and do the chores for the family and take care of the kids. There is no time to review what they have learned or do homework and at night they are too tired, after all that, to study anymore which is another reason for stress” (115).

42. Hommen, Leif. *Setting Patterns: Technological Change, Labour Adjustment and Training in British Columbia’s Lumber Manufacturing Industry*. PhD Dissertation. University of British Columbia, 1994.

This PhD dissertation uses case studies in BC’s lumber manufacturing industry to examine the volume and distribution of employer-sponsored training. The case studies examine “traditional” plants, “high tech” plants, and “transitional” plants. The author identifies the allocation of training, the kinds of training programs, the patterns and determinants of training and the barriers and incentives to training.

- “Consequently, external, publicly subsidized institutional training becomes, for most employers, a cheaper source of skilled labour...The resulting expansion of publicly provided or subsidized formal occupational training in post-secondary institutions further diminishes the viability of internal training by reducing the quantity and quality of candidates, thereby contributing to an escalation of the costs of internal recruitment and training and a concomitant decline in post-training productivity” (113).
- “Where occupational training must incorporate firm-specific elements, provides employers with low-cost screening of workers for job- and firm-specific traits, and where employers’ ability to substitute within the internal labour market is limited, employers will have strong incentives to provide ‘general’ occupational training within the firm” (114-115).
- The author refers to California’s Employment Training Panel (ETP) as an example of a “program financed by the partial conversion of UI taxes into funds for worker retraining -- a scheme that results in no additional taxes for employers... The program utilizes a wide range of financing arrangements, performance-based contracts, and cost-sharing agreements involving not only employers and the state

- but also unions and other groups involved in training” (118).
 - “According to both union and management respondents, the only major barriers to increased training provision at the plant were economic factors -- the problem of ‘poor return on investment’ from management’s perspective, and from the union’s perspective, the problem of ‘conflict with production’” (269-270).
43. Hommen, Leif. The British Columbia Labour Force Development Board: Delivering Consensus. in Rodney Haddow and Andrew Sharpe, eds. *Social Partnerships for Training: Canada’s Experiment with Labour Force Development Boards*. Kingston: School of Policy Studies, 1997.

This article chronicles and examines the conception, development and dissolution of the British Columbia Labour Force Development Board (BCLFDB).

- On October 31, 1996 the BCTAB was eliminated due to “a \$750 million budget reduction target” (217).
 - “The BC government had always been reluctant to transfer decision-making powers to the board” (218).
44. Hull, Glynda. “Hearing Other Voices: A Critical Assessment of Popular Views on Literacy and Work.” in Glynda Hull, ed. *Changing Work, Changing Workers: Critical Perspectives on Language, Literacy, and Skills*. Albany, NY: State University of New York Press, 1997.

By incorporating the voices of workers who experience literacy training, this article challenges popular views on literacy. The author criticizes and dismantles the belief that the onus of literacy should be placed on the worker and that low literacy levels are responsible for a lagging economy.

- “The most pervasive and unquestioned belief about literacy in relation to work is simply that workers do not possess the important literacy skills needed in current and future jobs” (5).
- “The popular discourse of workplace literacy is persuasive to a lot of people. It has a logic: workers lack literacy, jobs require more literacy, therefore workers are to blame for trouble at work and employers are faced with remedial training...I will object to the tendency in current discussions to place too great a faith in the power of literacy and to put too little credence in people’s abilities, particularly those of non-traditional and blue-collar workers” (10).
- “It is hardly credible, given the complexities of work, culture, and ideology in this country, that worker illiteracy should bear the burden of causality for a lagging economy and a failure at international competition, or that literacy should be the

solution to such grave problems” (13).

45. Industry Canada. *Sector Competitiveness Frameworks. Education and Training Services Part 1 - Overview and Prospects*. Ottawa: Industry Canada, 1998.

This document outlines the potential areas in which Education and Training Services (ETS) organisations should get involved. It indicates that Canada, as a leader in education, can be a competitive leader in the supplying of education and training services in the world market. This study outlines future opportunities, such as niche marketing in distance training, technology-based training, etc.

- For instance, it points out that Mexico, with half the population under the age of 20 has a huge potential market in learning systems (11).
- “The education and training services (ETS) industry consists of establishments and organizations engaged in the delivery of education and training services mainly on a fee or contract basis for profit...There are four general components within the industry: firms specializing in education and training programs and their accompanying products and services...businesses in other industrial sectors...that provide education and training services either as a supplement to their main product or service line or on a stand-alone basis, private schools and training institutions, commercial activities of public education institutions such as colleges, universities and CEGEPs” (5).

46. International Labour Office. *World Employment Report 1998-99*. Geneva: ILO, 1998.

This document contains the following 8 chapters: (1) Global employment trends, (2) Globalization, technological change and demand for skilled labour, (3) Training systems: Adjusting to change, (4) Improving the efficiency and governance of training systems, (5) Impact of education and training and competitiveness and growth, (6) Women and training in the global economy, (7) Training and the labour market: The impact on the employability of informal sector and vulnerable workers, (8) Main conclusions: How training matters. Of particular interest is chapter 4 which contains a section on the financing of training. The following are identified as the common elements which appear to enhance training effectiveness: adequate financing, quality, national training policies, reliable and easily accessible information, national skills recognition and certification system and networking.

- “One fiscal instrument which is not a drain on government income is the training levy. Levies typically involve an annual amount being assessed by the government, usually of 1 to 2 per cent of the wage bill paid by employers. In some cases, smaller firms may be exempt, and larger firms may pay more” (91-92). This kind of

- strategy has been used particularly in Latin America and Singapore.
- “Under the levy-plus-grant systems a portion of the levy is returned directly to the firm to cover training conducted either directly by the firm or contracted through a training agency” (93). This kind of strategy has been used in France, Singapore, Tunisia, Nigeria and Zimbabwe.
 - “Led by France, many European countries have since the 1970s given employees statutory rights to educational and training leave...For the individual, it is both more expensive and more risky than is employer sponsorship” (95).
 - “Voucher systems deserve consideration because of the potential benefits resulting from increased choice and competition to supply training programmes. A more realistic possibility might be to use vouchers and tax credits in combination with conventional funding, the one to fund pilot programmes and critical areas of specialized need and the other to support traditional training programmes” (96).

47. Johnston, Wendy. *Labour-initiated Literacy Programs in Canada*. Ottawa: National Literacy Secretariat, 1994.

This document first outlines the context within which literacy programs operate, with a focus on the social and economic climate, as well as the perception of literacy. The second section deals with current labour-initiated literacy programs in Canada and outlines the different approaches taken by different initiatives. The third section deals with concerns and suggestions presented by the author, such as the role of the National Literacy Secretariat. Of particular interest is the portion in the second section which deals with program costs.

- “The costs incurred in workplace literacy programs include the cost of needs assessments, training instructors and setting up programs, lost time for worker-participants, the cost of the instructor, facilities and materials. On-going costs might include the cost of the time to monitor and evaluate the programs” (15-16).
- The author identifies the differences which occur in different training schemes. For instance, “In the BEST, WEST and EAST programs, instructors also donate their time to prepare and teach courses. Facilities are often provided by either the employer or the union. These are often called ‘in-kind’ contributions, but represent the majority of program costs” (16).
- “Even when they are able to find funding, it is often short-term and programs lurch from fiscal year to fiscal year without knowing what their futures will bring” (17).
- “The training trust fund option may prove interesting to other national unions, since the burden of financing training programs would rest with the employer, but the trust fund would be administered by either the union or jointly by management and the union” (17).

48. Joint Union Management Program, Pulp and Paper Sector, British Columbia.
Operational Report for the First Year of JUMP! Sept. 1997.

The Operational Report provides an overview of the results of the JUMP program. Of particular importance is the chart which indicates where the money is going: 63% to tuition, 14% to instructor cost, 4% to materials, 4% to rental, 9% to income replacement, 6% to expenses.

49. **Kitchen, Harry and Douglas Auld. *Financing Education and Training in Canada: Canadian Tax Paper No. 99*. Ottawa: Canadian Tax Foundation, 1995.

This paper outlines the current sources of funding for education and training in Canada. It describes the structure of the funding systems at the national and provincial levels and provides valuable statistics and other quantitative data on the breakdown of the funding. Of particular interest to this project are the sections which outline the sources of funding for training and outline efficiency and equity criteria which would inform the development of training policies in Canada. In these chapters, the authors suggest that tax reform is needed so as to provide sufficient support to the individual and the firm Regarding training issues.

- “It is puzzling, first, that as a country we do not know just what we do spend on training, except that in 1991-92 it was in the range of \$1.4 to \$2.0 billion, and second, that we understand little about the *effect* of this expenditure on such things as employment stability, job flexibility, earnings, and access to the job market” (117).
- “In the case of retraining the work force, the private return often has two components. The first is the benefit to the individual in terms of employment security, and the increased probability of promotion. The second private benefit is to the firm itself in terms of an increase in the quality and quantity of human capital, which it is hoped will lead to increased productivity and growth” (118).
- See page 130 for economic justification of government intervention in training issues.
- “Increasingly, firms are viewing employee training as an investment in human capital. Current tax rules prevent them, however, from incorporating such expenditures in their long-term planning in the same way that they can treat physical capital investments” (139).

50. **Klein, Ross A. "Training for What? A Critical Analysis of Provincial Initiatives to Foster Labour Force Attachment among Recipients of Social Assistance." in Thomas Dunk, Stephen McBride and Randle W. Nelson, eds. *The Training Trap: Ideology, Training and the Labour Market*. Winnipeg: Society for Socialist Studies, 1996.

Klein critically examines provincial and federal initiatives designed to deal with increased unemployment and dependence on support assistance.

- In 1992 New Brunswick introduced NBWorks, a \$177 million program that "over six years would shift the cost of support for up to 12,000 person-years from the provincial to the federal government, is designed to prepare persons for employment through a three-and-one-half-year program of work experience, basic adult education leading to a high school diploma, job skills training, and internships" (129).
- In Alberta in 1993, changes took place based on the following principles, which would apply to all save for those who were severely disabled or were single parents with children below the age of six months: "(1) entitlement to social assistance benefits should be viewed as temporary and transitory; (2) benefits should be available only after other sources (including family members) have been exhausted; and (3) persons in receipt of social assistance should not be better off than the working poor" (134)
- Klein concludes, "the recent developments of employability programs in Canada appears to be following two trends. First, despite the fact that there are fewer jobs than there are people wanting to be employed, the primary focus in most provinces is on training for employment...A second trend, and one that is more recent, is the move in Canada towards a system of workfare" (141).

51. Krahn, Harvey and Graham S. Lowe. *Literacy Utilization in Canadian Workplaces*. Ottawa: Statistics Canada, 1998.

This study, based on International Adult Literacy Survey (IALS) results, overviews the need for increased workplace literacy and examines the levels of literacy in various workplaces. This document examines many factors such as gender, industry and age. Chapter 3 is of particular interest as it does a discussion and interpretation of the results. The recommendations include continuing research into this area, concentrating on increasing the skill requirements of jobs, etc.

- "Thus, while literacy enhancement programs are required for some of those in the literacy deficit category (as well as for some workers in the "low-low" literacy fit group), we also need programs that encourage employers, along with their employees and the various organizations that represent them (ie., unions and

professional associations), to seek ways to upgrade the literacy (and other skill) requirements of jobs” (61).

52. Levine, Herbert and Carroll M. Hutton. “Financing Labour’s Role in Education and Training.” in Hal Stack and Carroll M Hutton, eds. *New Directions for Experiential Learning*. 10 (1980): 75-84.

This article examines the present and future involvement of unions in sponsoring training initiatives in the United States. The author breaks down union-sponsored training into the following categories: 1) apprentice training, 2) on-the-job training and upgrading, 3) tuition refund, 4) education, training, and cultural trust funds, and 5) paid educational leave (75). With these distinctions, the author defines each kind of training and identifies the initiatives that have taken place in these areas. While this information is of interest for background and history, the figures and information given are from the late 1970s and are therefore quite dated.

- Regarding apprenticeship training, “the apprenticeship agreement generally sets out the purposes, rules and procedures under which corporations train apprentices under the watchful eye of the union” (76).
- Regarding tuition refunds, “it is quite clear from the results so far published that participation of workers in educational programs increases drastically when labor or management makes special efforts. More is required than simply negotiating or providing tuition-refund benefits. Evidence also suggests that special, adaptive measures on the part of educational institutions can help to increase worker participation” (78).
- Regarding trust funds, “the essential difference between the typical tuition-refund program, discussed above, and the education, training, and cultural trust funds is that the former is a negotiated entitlement which must be used or lost, while the latter is a direct-contribution by the employer to a fund which is usually cumulative, which may be jointly controlled fiscally but which is generally administered by the union. Therein lies a world of difference! (78-79). “Educational, training, and cultural trust funds are the most promising area of negotiated educational benefits because they can be used for a nearly limitless variety of programs with workers, their spouses and children” (80).

53. **Levine, Tamara. *A Discussion Paper on Unions and Literacy*. Ottawa: Canadian Labour Congress, 1997.

This paper broadly defines literacy, outlines the needs of literacy in the workplace and highlights the role of the unions in providing workplace basic education to the membership. The paper outlines the Central Labour Bodies in each province and discusses

their current roles. In the final section, the paper provides recommendations to the CLC and indicates the rationale for each. Of particular interest is the section “What about financing?” (20-22). This section describes public funding, bargaining imperatives, payroll taxes and control of funding.

- “Although (sectoral) councils only represent some sectors of the economy and are at varying levels of development, they have been a source of financing for a range of training programs, including basic skills” (20).
- “The CAW, for example, was successful in entrenching basic skills training for their members in collective agreements with the Big Three auto manufacturers” (21).
- The following are variations on the kinds of provisions being sought: joint training and education committees, full or partial paid time during training, a cents per hour contribution or percentage of payroll to union education, jointly trusted fund with employers, training for employees in a current or prospective lay-off situation (21).
- Recommendations made to the CLC: (1) Entrenchment of a commitment to Union Literacy, (2) Communications and Information-sharing, (3) Research, (4) Profile, (5) Plain Language, (6) CLC Staff Training (31).

54. Lewington, Jennifer. “Educated Employees Get the Most Training.” *Globe and Mail* 9 June, 1997, Metro edition: A11.

This article reports briefly on who is getting training, using 1993 data from Statistics Canada.

- “The higher your level of education, the better your chances of training on the job.”
- “A Statistics Canada analysis of adult education and training in 1993 also shows that those least likely to participate in on-the-job training have less education, work in small firms and generally live in Quebec or Atlantic Canada.”
- “While 26.8 per cent of working Canadians had some job-related training in 1993, three out of four were supported by their employers. Notably, 40 per cent of workers with a university degree took part in training, compared with 13.5 per cent of high school dropouts and 5.9 per cent of those with less than eight years of education...That attitude works against part-time employees, those in low-skill operations and young people.”

55. Marsick, Victoria J. and Karen E. Watkins. *Informal and Incidental Learning in the Workplace*. London: Routledge, 1992.

This book examines the ways in which individuals and collectivities learn from a conservative/business perspective. Of particular interest is the section of the introduction which deals with “Understanding learning in training.”

- “Individuals learn and work in social units where interactions are not typically subject to design and control by trainers” (35).
- A report done by the Work in America Institute in 1985 indicated that “employees are expected to understand how each part works together to form the whole and how their work units fit in the organization. An active, non-hierarchical form of interaction is encouraged among work teams, managers, and trainers along with peer learning among co-workers. This approach signals a growing recognition that the enormous demands for learning in the workplace will require increasingly informal learning processes that are common to the entire organization” (36-37).
- The authors posit frameworks for understanding the ways in which individuals, groups, organizations and professionals learn (40-45) and compile this information into a “human resource learning cone” which attempts to illustrate “the way in which informal and incidental learning permeate all other human resource activities within an organization” (46).

56. Martin D’Arcy. “A Decade on the Training Rollercoaster: A Unionists’s View.” in Sue M. Scott, Bruce Spencer and Alan M. Thomas. *Learning for Life: Canadian Readings in Adult Education*. Toronto: Thompson Educational Publishing, Inc., 1998.

The author describes the process and outcome of the Ontario Training and Adjustment Board. In particular, he presents his perspective as a union representative involved in the process and recounts the perception of union participation.

- The author posits that unions must advocate the following: “skills-based agreements that link job classifications to skills and training...training based on nationally recognized standards that are transportable from province to province...training for the unemployed that is linked to real employment opportunities” (154).
- “The first issue about ‘co-determined’ training, i.e., training policy developed through participation of all stakeholders, is that the employers were there first; and most government officials saw their continuing claim to priority as legitimate” (155).
- At public hearings, labour advocated training as a universal right and employers argued that it should be ‘needs-driven’ (158).

- “Traditional business came to the table with the formation of the Canadian Labour Market and Productivity Centre and the Canadian Labour Force Development Board. And, they have stayed at the table as long as government is footing the bill, and neither the Centre nor the Board has any power” (161).

57. Martin, D’Arcy. *Keeping Difficult Company*. Toronto: Communication, Energy and Paperworkers Union of Canada, 1993.

This document contains notes for a presentation to a joint labour-management conference, from a union perspective.

- The Sectoral Skills Council “agreed to set the level of contribution at 1% of payroll, made up of four equal parts – from employers, from the federal government, from the provincial government, and from the employee wage packet. This means that unionized workers agreed to re-direct a wage increase of a quarter of one per cent in order to get the SSC on its feet” (3-4).
- “New Right thinking has penetrated so deeply that many business people don’t really consider that there’s a debate. Rather, they think theirs is ‘rational’ thinking, against which are arrayed some stubborn bureaucracies and a range of clamouring ‘special interest’ groups, of which labour is one” (5).
- “Unionism, far from being an anachronism, an idea that’s outlived its usefulness, is in fact a leading edge tool for empowered workplaces” (8).
- When discussing the issue of OTAB, the author notes, “In the process, the social equity groups have felt slighted and manipulated, business has hardened its resolve to resist a payroll tax for training, and labour has become sick of being taken for granted by a government it helped to elect...Even in these circumstances, partnerships are possible” (12).

58. Martin, D’Arcy. *Building a Solid Foundation: Next Steps in the UFCW*. UFCW National Training Programme report to the Canadian Director, 1998.

The author makes several recommendations regarding the training programme at the UFCW.

- “Recommendation #7: That the mandate of the National Training Fund be amended, to include course development and pilot projects for outreach and distance education initiatives in foundation skills, with particular attention to members of locals not currently served by a training centre” (20).
- “Recommendation #10: That the UFCW explore a more comprehensive relationship with public education providers and community-based not-for-profit training providers, in the spirit of the CLC protocol and with the primary goal of

increasing learning opportunities for the members” (23).

59. Miller, Louise. “The Training Situation in Quebec - Responses to the National Survey.” *Research Papers presented at the CLC National Training Conference - June 25 to 27, 1997*. Ottawa: Canadian Labour Congress, 1997.
- This article briefly outlines the situation in Quebec Regarding training. The author explains the training activities of the Federation des travailleurs et travailleuses du Quebec (FTQ), and its affiliates and provides a critique of the system. In addition, the author proposes broad union objectives for training.
60. Mitchell, Ayse G. *Strategic Training Partnerships Between the State and Enterprises*. International Labour Office Website. March, 1998. Online.

The paper is based on 14 case studies on public/private training partnerships in Australia, Chile, Denmark, France, Germany, India, Ireland, Côte d’Ivoire, Japan, Malaysia, South Africa, Spain, United Kingdom and the United States. In addition, this document contains a review of published material, interviews and discussions at various seminars and conferences.

- “Employability is enhanced by “core” competencies, which are portable from one job to another, within the company and from one enterprise to another, rather than by job-specific skills, which are less transferable” (7).
 - “The overall objective of public/private training partnerships is to mobilize a collective effort to enhance the relevance, effectiveness, efficiency, equity and sustainability of training and to forge an optimal response to address the skill requirements of individuals, enterprises, the community and the objectives of national development” (10).
 - “A collective effort in financing can have a beneficial impact on diversifying and expanding resources for training, which in turn can result in a broader availability of training opportunities and greater resource stability”. (28).
 - In the section Joint Financing and Incentives, this paper examines the various sources and strategies for public, private and individual funding in a comparative context and examines the pros and cons of each (30-36).
61. Newman, Michael. *Defining the Enemy: Adult Education in Social Action*. Sydney: Stewart Victor Publishing, 1994.

Section 6 of this book, “Traps, tricks and hegemonic sidetracks,” explains how industrial collusion threatens union sovereignty and solidarity.

- “Collaboration, cooperation and consensus, for example, seem sensible ideas, and in industrial relations they are current ideas. Unionists and managers are being exhorted to overturn the last hundred or more years of an industrial relations system based on conflicts of interest, and to restructure their workplaces and the way they work...The rhetoric is seductive, and some trainers in the industrial relations arena have been ensnared by it. Some union trainers in Australia have embraced joint union-management training, in the apparent belief that the nature of the beast has suddenly changed and that the people that they have trained their members to watch carefully and never fully trust can now become equal partners in a some kind of utopic joint enterprise” (91).
- If (unions) cooperate with management it must be in order to keep (or make) the bastards honest” (92).

62. O’Connell, Philip J. *Adults in Training: An International Comparison of Continuing Education and Training*. Dublin: The Economic and Social Research Institute, 1999.

This study provides an analysis of the IALS through examining cross-national differences in the incidence and volume of continuing education and training among adults. In particular, pages 25-30 deal with financing training, comparing 10 OECD countries from 1994-94 statistics, in tables 18-22 (Austria, Belgium, Canada, Ireland, Netherlands, New Zealand, Poland, Switzerland, UK, US).

- In the Canadian context in general: 36.5% of Canadians between the ages of 25-64 participated in some kind of education/training, 29.5% of Canadians participated in job-related training (9).
- In Canada, specifically in regards to funding for job-related training in 1994-95, 38.8% of funding came from the individual, 74.1% of funding came from the employer and 14% of funding came from the government (25). For all education and training, 43.1% came from the individual, 66.9% came from the employer and 14.1% came from the government (25).
- “Considering all education and training, in every country a higher percentage of men than women, who participated in training, received financial support from employers, while a greater percentage of women provided funding for their own education and training...As might be expected, these gender differences are less marked in respect to job-related training, although in all cases except Canada, employers provided funding for a greater proportion of male than female trainees. Women were somewhat more likely to benefit from Government funding than men” (26).

63. O’Gorman, Lori A. Stinson. “Popular Education and Working-Class Consciousness: A Critical Examination of the Saskatchewan Federation of Labour’s Workers’ Education for Skills Training Program.” in Thomas Dunk, Stephen McBride and Randle W. Nelson, eds. *The Training Trap: Ideology, Training and the Labour Market*. Winnipeg: Society for Socialist Studies, 1996.

This chapter examines the history, theoretical background, and practical application of the Saskatchewan Federation of Labour Workers’ Education for Skills Training Program.

- “The central question examined is whether or not the SFL’s WEST Program facilitates the development of working-class consciousness” (167).
- The authors conclude that “as long as the contradictions are apparent, are openly acknowledged, and form a consistent point of struggle, WEST and programs like it can potentially pose meaningful opportunities for developing a liberatory consciousness” (188).

64. Olthius, Doug. “Collective Bargaining and Training.” in *Training for What? Labour Perspectives on Skill Training Our Schools/Our Selves*, Nov. 1992.

This chapter describes the union experience of collective bargaining for training. It describes how training is bargained, it asserts the union principle of training as a right and speculates on the future direction of collective bargaining and training.

The author asserts four general contexts around which unions bargain training:

- “1. *Access/rationing* of training opportunities. This type of bargaining would be related to job ladders or lines of progression, particularly in large industrial plants where workers need to be trained - usually on-the-job - to move up the line.
- 2. *Trades qualifications*. We bargain for apprenticeship programs, although with less and less success in recent years.
- 3. *Technological change*. We bargain for the right to be trained on new equipment, and we bargain for training for longer-service employees so they can bump into jobs that provide them the same standard of living.
- *Lay-off*” (44).
- “Management wants public training dollars. That gives us an edge in the process of social bargaining. Once those arrangements are in place, individual negotiating committees at the traditional bargaining table may be able to bargain training more effectively” (49).

65. Organisation for Economic Co-operation and Development. *Labour Market Policies: New Challenges. Lifelong Learning to Maintain Employability*. Meeting of the Employment, Labour and Social Affairs Committee at Ministerial Level, 14-15 October, 1997, Château de la Muette. Paris: Organisation for Economic Co-operation and Development, 1997.

This study deals broadly with the role of lifelong learning in ensuring employability in an era of changing workplaces. In addition, this paper examines policy issues for labour ministers, such as how to improve the transition from initial education to work and how to address lifelong learning needs for poorly qualified adults. Of particular interest is the statistical annex (pages 29-47) which provides comparative tables of 21 countries including Canada and Sweden., which outline labour force participation in education and training with cross-cutting factors such as gender, age, education level, etc.

- For a Canadian man at all levels of education between the ages of 35-44, the participation rate for job-related continuing education and training was 31%. For a woman in the same situation, it was 34%. For a Swedish man in the same situation in 1995, it was 40% and for a Swedish woman it was 51% (38).
- Table 14 indicates the trends in employment of persons with low levels of educational attainment, by industry. In the Canadian paper, printing and publishing industry from 1984-94 the percentage was 2.3%, whereas in the food, drink and tobacco industry it was 3.2%. The annual growth rate of the employment of persons with a low level of educational attainment in the paper, printing and publishing industry was -10.3%, whereas in the food, drink and tobacco industry it was -7.6%.
- “The affordability of lifelong learning depends also on relaxing liquidity constraints that arise where learning opportunities need to be paid for before the benefits are realised” (18).

66. Piker, Jeffry. *Auto Parts Certificate...An Innovative Approach to Training*. Kingston: Automotive Parts Sectoral Training Council.

This brief study outlines and evaluates the training initiatives of the Automotive Parts Sectoral Training Council. The author identifies the main features of the APST approach as the following: bi-partite framework, sectoral focus, respect, integrated curriculum, peer trainers, participatory format and “opening doors” (2).

- Management (APMA) and labour (CAW) work cooperatively on this program and operate on a unanimous decision-making process (4).
- “The *working knowledge* of trainees is seen as a core resource for the teaching/learning process” (7).

67. **Rees, Teresa. *Mainstreaming Equality in Training Policy in the European Union*. Online. Western Research Network on Education and Training. Working Paper Series. 17 July. 1999.

This article assesses how gender is treated in training policy. To the extent that funds are allocated to redress gender inequities, and to the extent that taking gender concerns into account requires resources, this article is extremely pertinent to our study. The author outlines the importance of gender issues in training policy and explains the experience of the EU in mainstreaming gender into its policy.

- “Women are the majority of the unemployed, the long term unemployed, the low skilled, the new labour market entrants and the under-employed. Economic development policies clearly need to take this on board in strategies aimed at developing human resources” (2).
- “To be effective, as de Bruijn (1995:11) concluded, equality policies need to be integrated into labour market analysis and policies rather than tacked on” (4).
- Mainstreaming seeks to integrate equality into organizational cultures and infrastructure” (5).
- “Despite the fact that the White Paper was not based on a gendered analysis of the economy, for a variety of largely political reasons, there is a growing commitment in the EU to an approach towards gender equality in the EU which challenges the extraordinarily rigid patterns of gender segregation which characterise education, training and employment” (9).

68. Robertson, David. “Corporate Training Syndrome: What we have is not enough & more would be too much.” in *Training for What? Labour Perspectives on Skill Training Our Schools/Our Selves*, Nov. 1992.

This article includes facts and figures about corporate training for employed workers. In addition, this study reveals the goals of corporate training programs. Of particular interest is the “facts and figures” section.

- “Canadian business spends less than one half of 1 percent of its payroll on formal training programs...In Canada it has been estimated - on an economy-wide basis - that companies annually spend about \$100 to \$150 per employed worker on training” (19).

69. Roger, Margarit. *The Maturing of a Profession: An Overview of Workplace Education Practitioner Development Opportunities*. Ottawa: National Literacy Secretariat, 1999.

This document outlines workplace practitioner development training programmes across the country and indicates the course content as well as the contact person at each institution.

70. Rubenson, Kjell. "Sweden." in Peter Jarvis, ed. *Perspectives on Adult Education and Training in Europe*. Florida: Krieger Publishing Company, 1992.

This article chronicles the development of adult education in Sweden from the 1800s to present day. The author describes the various study associations/circles which exist as well as municipal adult education and labour market training. Of particular interest are the sections which deal with employer-sponsored education, training programmes sponsored by employee organizations and the financing of adult education (328-329).

- "According to Statistics Sweden (SCB, 1990), 32% of employed persons, in 1989, received some form of employer-sponsored education...There is no comprehensive legislation governing education and training on the Swedish labour market. However, several of the major Labour Acts, either directly or indirectly, have ramifications for education and training of employees in the private and public sectors" (328).
- A commonly quoted figure on how much employers spend on training and education is 20-25 billion SEK for 1988, representing 1.8-2.2% of GDP (328).
- "All three levels of education in Sweden - compulsory comprehensive, upper secondary and higher education - are financed entirely from public funds" (329). In regards to adult training and education, save for study circles and employer-sponsored training, the same principle of public funding applies.
- The author identifies the current trend in Sweden as heading towards less public funding and support and more private initiatives and thus a large policy dilemma arises (331-332).

71. Savner, Steve. *Training Issues Under the Workforce Investment Act of 1998*. Draft. Center for Law And Social Policy Website. 23 Oct. 1998. Online.

This paper discusses the implications of the Workforce Investment Act of 1998 in the United States on training. Of particular interest is the section which describes the various funding strategies which are the result of the Act. The author argues that the fragmentation of federally-financed efforts to provide a job training strategy led to the Act, however the Act did not rectify the problem. Rather, he posits that it led to "opportunities,

but only opportunities, for states and localities to better coordinate services and create a more accessible and effective system for the intended beneficiaries of these programs” (2).

72. Selman, Gordon and Paul Dampier. *The Foundations of Adult Education in Canada*. Toronto: Thompson Educational Publishing Inc., 1991.

The section in this book which deals with the sponsorship of training is of particular interest as it examines the private sponsorship of the Carnegie Corporation of New York. The authors raise the important point of the impact of the origins of funding on the recipient of training.

- “Unlike the education of youth which is predominantly provided for by the state, the education of adults historically owes its presence to sponsorship by independent organizations. From this situation has emerged an array of private sponsors including voluntary associations, religious groups, and philanthropic foundations. This private sponsorship has not only been instrumental in shaping the field of adult education but it has also been responsible for enriching its history” (121).
- “For the adult participant the question of sponsorship can be either of no concern or of great concern. Some sponsors are seen as being neutral, such as a school board continuing education department, while others are seen as having a specific purpose, such as a religious organization’s educational unit” (121-122).
- “Believing that the wealthy were ‘trustees’ of their wealth for the good of the public, Carnegie established several endowments for this philanthropic purpose, one being the Carnegie Corporation of New York” (122).
- “One of the earlier grants went to assist in the organization of adult education in Canada, and thus the creation of the Canadian Association for Adult Education in 1935” (123).

73. Selman, Gordon. *Adult Education in Canada: Historical Essays*. Toronto: Thompson Educational Publishing, Inc., 1995.

This book contains an essay entitled “The Adult Educator: Change Agent or Program Technician?” which is of particular relevance to this study. The author examines and questions the current and future role of adult educators.

- “Generally speaking, that sense of movement has faded into the background in adult education. The field is becoming professionalized and institutionalized” (24).
- “Recurrent education is a scheme whereby society is so arranged that people can switch back and forth throughout their working lives between the world of work

and the world of education. Paid educational leave is a crucial component of such a system” (25).

74. Shalla, Vivian and Grant Schellenberg. *The Value of Words: Literacy and Economic Security in Canada*. Ottawa: HRDC and NLS, 1998.

This document deals with literacy and its impact on economic security in a Canadian context. Chapter 2, “Economic security, lifelong learning and the practices of literacy” is of particular interest.

- This section contains a table: job related training and education received by working-age adults, by prose literacy and sex in 1994 (For Level 1 individuals 15% received job-related training, for Level 2: 29%, for Level 3: 41% and for Level 4/5: 49%) (29).
- 33% of individuals with low incomes said their reading skills somewhat or greatly limited job opportunities, whereas 9% of non-low income individuals said it was not at all limiting (34).

75. Shields, John. “Flexible Work, Labour Market Polarization, and the Politics of Skills Training and Enhancement.” in Thomas Dunk, Stephen McBride and Randle W. Nelson, eds. *The Training Trap: Ideology, Training and the Labour Market*. Winnipeg: Society for Socialist Studies, 1996. 33-72.

The author identifies two key elements in the current labour market: training and skill enhancement dominate public policy discourse, while the creation of more “flexible” employment has meant a huge drop in job security. The unstable labour market context is what drives workers towards retraining.

- “The post-Fordist era has also seen an increasing demand by employers for ‘just-in-time workers’ to accommodate the demands of ‘just-in-time production’” (58).
- “We must also recognize that skill is a very difficult thing to quantify. To a large degree, it has always been socially constructed. So-called ‘women’s skills,’ for example, have long been downgraded and undervalued. It is not surprising that capital would press now to undervalue ‘male skills’ in an effort to reduce labour costs” (62).
- “While the government will shift some resources from social support to training and skills enhancement programs, individuals are set to absorb the major adjustment costs. With the death of traditional notions of lifelong job security, individuals will need to make numerous career shifts over their working lives” (66).

76. Schultz, Katherine. "Discourses of Workplace Education: A Challenge to the New Orthodoxy." in Glynda Hull, ed. *Changing Work, Changing Workers: Critical Perspectives on Language, Literacy, and Skills*. Albany, NY: State University of New York Press, 1997.

This article deals with the different notions of workplace literacy. It critically analyses the prevailing definitions of workplace literacy and integrates personal experiences of workers into conceptions of learning.

- "In response to the perceived skills gap between the needs of businesses and companies and the qualifications of U.S. workers, the National Workplace Literacy Program was created in 1988 with the explicit purpose to fund projects designed to improve the productivity of the workforce through the improvement of literacy skills" (45).
- "The term 'functional literacy,' originally developed by the U.S. Army to indicate the skills necessary to carry out basic tasks in the military, assumed to be at a fifth-grade reading level, has recently gained currency as the accepted way to set up workplace programs" (49).
- "Contrary to the assumption that 'functional literacy' is a neutral and ahistorical term without cultural, social, economic, or political meanings, Fingeret suggests that CEOs, and others with managerial or oversight responsibilities, are the individuals authorized to define functional literacy" (51).

77. Statistics Canada and Human Resources Development Canada and the Organisation for Economic Co-operation and Development. *Literacy Skills for the Knowledge Society*. Ottawa: Statistics Canada, 1997.

This study provides results from the International Adult Literacy Survey (IALS), and highlights the links between economic growth and labour force skill through statistics of country comparisons. The four chapters are: Distributions of adult literacy; The benefits of literacy; Literacy acquisition during a lifetime; Adults' readiness to learn. Of particular interest is the latter, as it deals with participation in adult education and training and the sources of funding for training.

- "The challenge thus issued is for policy-makers to enable all citizens to have access to environments that both call for and enhance literacy and learning - in their homes, in their communities and at work" (11).
- In 1994-95, 26% of Canadian men received financial support from their employer, 24% received financial supported from their family or supported themselves and 9% received financial support from the government for adult education/training (100).
- In 1994-95, 20% of Canadian women received financial support from their

- employer, 28% received financial supported from their family or supported themselves and 13% received financial support from the government for adult education/training (100).
- “Lifelong learning is not solely the responsibility of government and the public sector; employers have a major role to play” (105).

78. Statistics Canada, Human Resources Development Canada and the National Literacy Secretariat. *Reading the Future: A Portrait of Literacy in Canada*. Ottawa: Statistics Canada, 1996.

This document examines results from the International Adult Literacy Survey (IALS) in the Canadian context. It provides the demographic distributions of literacy in Canada in chapter 1, the economic dimensions of literacy in Canada in chapter 2, literacy practices in Canada in chapter 3 and measuring the success of the IALS in chapter 4. For our purposes, chapter 2 provides useful information on the skill level of individuals in different occupations and at different levels in the organization/firm (40).

- “Literacy is strongly associated with economic life chances and opportunities. This affects employment stability, the incidence of unemployment, and income, among other things” (12).
- The proportion of adults at each literacy level, prose scale, who reported that there was education or training they wanted but were unable to get, both for work and for personal interest, Canadian adults aged 16 and over. Level 1: Personal interest 13%, Work related 11%; Level 2: P.I. 25%, W.R. 22%; Level 3: P.I. 32%, W.R. 30%; Level 4/5: P.I. 40%, W.R. 35% (52). Note that the explanation of each level of literacy is located on page 16.

79. Statistics Canada and the Organisation for Economic Co-operation and Development. *Literacy, Economy and Society: Results of the first International Adult Literacy Survey*. Ottawa: Statistics Canada and the OECD, 1995.

This document outlines the purpose of the IALS and describes the standards and processes by which literacy skills are assessed. Chapter 3, in particular deals with the distribution of literacy in a comparative context.

- Table 3.5 indicates the proportion of workers in each industry who are at a particular literacy level across 8 OECD countries (66).
- Chapter 4 outlines the practices of literacy, including a table showing the proportion of workers in each occupational group who reported engaging in each of several workplace reading tasks at least once a week (91).
- The extensive annexes provide comparative tables for determining capacities such

as reading and writing levels (121-199).

80. **Stephen, Jennifer. *Conference Paper for CLC Ontario Training Conference held in cooperation with the OFL to Develop an Ontario Labour Training Strategy*. CLC, 1998.

The first section focuses on the political and economic context in which training is negotiated and implemented in Canada with a focus on Ontario. It describes the Canadian Labour Force Development Board and the Ontario Training and Adjustment Board, and outlines the difficulties which unions encountered in each. The second section reviews the fundamental principles of unions as they enter into bargaining and providing training services for the membership: (1) Training is a right, (2) Workers need training that is developmental, (3) Employed worker training is an employer obligation, (4) Training for unemployed workers should be paid for through general public revenues, (5) Workplace training should be negotiated, (6) Delivery of training is a public responsibility that must stay in the public sector, (7) Training is a tool for greater equity.

- Some examples of successful bargaining include the USWA members who have access to a negotiated training allowance, the CAW which has negotiated a \$30 million training programme, the CUPW which bargained up to \$6 million to be used toward job creation and training projects (9).
- “In previous years both the federal Industrial Adjustment Service and provincial Office of Labour Adjustment were mandated to provide adjustment programming as a regular feature of labour market policy...The federal government has steadily withdrawn from adjustment in response to workplace layoffs and closures...All provincial tracking and monitoring of layoffs and closures has been cut back” (12).
- In regards to services and benefits for unemployed workers, the UI program becomes instrumental. However, it has increasingly come under attack by cuts: “In 1989, approximately 87% of all unemployed people were receiving Unemployment Insurance benefits in any given month. By 1997, only 42% of all unemployed people nationally were receiving UI benefits. Only 26% of unemployed people in Ontario were receiving Unemployment Insurance benefits” (15).
- Since the dropping of the Designated Group Policy (DGP), “there is no way to make sure that public dollars are allocated according to equity objectives. Funding guidelines issued by HRDC included equity objectives until this year, when all reference to equity was dropped” (26).
- Proposed actions for labour are: (1) Bargaining training on and off the job, (2) Training and adjustment for unemployed workers, (3) The fight to defend apprenticeship, (4) Protecting the public system and public sector jobs, (5) Fighting for training and employment for youth, older workers, women and

workers of colour, (6) Labour's approach to bi-partite and multi-partite boards and councils, (7) Literacy and foundation skills as part of our agenda, (8) The need for supportive public policies and programs fighting for national standards in a provincialized system (37-48).

81. Sutherland, Jim. "Membership & Employee Development in a Global Community: A Trade Union Approach." Conference Paper for CLC Ontario Training Conference held in cooperation with the OFL to Develop an Ontario Labour Training Strategy. Toronto, June, 1998

This paper critically examines the current approaches to running and funding workplace learning in the UK. Of particular interest is section 11, "Funding Workplace Learning."

- The author states that the "'levy-grant' system established following the 1964 Industrial Training Act was successful in increasing the quantity and quality of training" (14). However, when the levy grant system was replaced with the levy-exemption process introduced by the 1973 Employment & Training Act. "The redistributive mechanism of the levy-grant was lost and the role of the Industrial Training Boards shifted towards inspection. As a result, employers perceived their role as increasingly bureaucratic and subject to state interference" (14).
- "The creation of Individual Learning Accounts, contributed to by Government, employers and individuals, with their twin core principles of shared responsibility and shifting the emphasis of support to learners themselves and away from learning routes or institutions, provides a significant opportunity for promoting the interests, and widening the constituency of learners (14).
- "Employers should be expected to fully fund task specific or job-related learning...The existence of Individual Learning Accounts must not lead to a situation where those who already benefit the most from learning, and who can afford to contribute to an account, become the main beneficiaries from a new approach to workplace learning" (15).

82. Swift, Jamie. *Wheel of Fortune: Work and Life in the Age of Falling Expectations*. Toronto: Between the Lines, 1995.

This book examines case studies and interviews from Kingston and Windsor in order to establish the current trends in employment and lifestyle in the capitalist system. Of particular interest is chapter 4, "The Training Gospel and the Army of Servants," which examines the education and training systems in historical and present day contexts.

- "Today's training gospel has a distinctly different emphasis. Now we hear constantly about the need for workers to equip themselves with the new skills

demanded by a competitive globalizing world. Still, though the words may be different, the melody lingers on. The questions - what skills? what workers? what jobs? - are resoundingly familiar” (93).

83. Terepocki, Megan. *Survey of JUMP Goals*. Nanaimo, Nov. 1998.

This survey tracks the progress of the Joint Union Management Program, the training initiative in the pulp and paper sector of British Columbia.

- “In just a few years JUMP has had a significant impact on attitudes toward training and on the ability of local mills to develop effective training initiatives. This includes some mills that had never planned training before. According to the participants of this survey, JUMP training has influenced individual employability within the mills, assisted in job loss, benefited both hourly and salaried workers, increased confidence in the workforce, overcome barriers in joint human resource planning, assisted in training for new technology, and improved morale in the workplace” (i)
- Union comments on why JUMP was successful: “It was effective because there were resources attached and once people realized that it was out there, and that there was assistance in planning--the response was overwhelming” (11).
- Management comments on why JUMP was successful: “The company saw a lot of administrative costs and I’m not sure we would have done this without JUMP funding...The committee actually had a budget. So the discussions meant something” (11).
- “Almost all of the people interviewed (16/19) saw a link between training and productivity in the industry (8 union, 8 management). Some people felt that training had direct cost benefits to the industry while others felt that training had more indirect effects on productivity” (18).

84. Thomas, Alan M. *Beyond Education: A New Perspective on Society’s Management of Learning*. San Francisco: Jossey-Bass Publishers, 1991.

In this book, the author identifies the most important characteristics of learning as: learning is action; learning is individual; learning is influenced by other people; learning is a response to stimuli; learning is lifelong; learning is irreversible; learning takes time; learning cannot be coerced. Of particular interest is the point that learning takes time as time implies money.

- “The amount of time needed to learn something varies greatly with the individual; one person learns quickly and with apparent ease, while another may find the same learning task lengthy and painful. The time needed for an individual’s learning also

- may vary with the type of learning task” (13).
- “There can be no doubt that in general we will have to incorporate into our social fabric more flexible allowances for the time it takes, and for differences in the time it takes, for people to learn” (14).

85. Turk, Jim. “If ‘training’ is the answer, what is the question?” in *Training for What? Labour Perspectives on Skill Training*. Our Schools/Our Selves, Nov. 1992.

The author first asserts that training has become fashionable for business and governments, but is still scarce for most employees. Second, the author indicates that training is not the key to a better economy, rather a better economy is the key to training as funding is the most scarce resource. Lastly, the author describes the incentives from the labour perspective for increased training and outlines labour’s view of good training.

- “This suggests how little employer training is provided...Most people have taught themselves (with help from their co-workers) how to do their jobs and do them well! (2).
- “While training is important for labour, we are very clear that it is not a substitute for an economic strategy for full-employment - a strategy that will produce secure, well-paying jobs” (5).
- “Training should help people have more control over their jobs and their work life, learn more about individual and collective rights and reflect the workers’ identification of skills needs” (6).

86. United Food & Commercial Workers Union, Local 2000 Training Centre. *United Food & Commercial Workers Union, Local 2000 Training Centre Mission Statement and Apprenticeship Program*.

This information package provides background information on the Training Centre, in New Westminster, British Columbia. For our purposes, the public funding sources and educational partnerships are of particular interest.

87. Van Gent, Bastiaan. "The Netherlands." in Peter Jarvis, ed. *Perspectives on Adult Education and Training in Europe*. Florida: Krieger Publishing Company, 1992.

This article chronicles the development of andragogy in the Netherlands, from the 1700s to present day. The author characterizes the current situation as unclear and scattered as a result of the growing pressure from the Dutch government on universities to engage in "hard" endeavours that are financially as well as scientifically fruitful" (26-27).

- "With regard to the allocation of funds, quantitative methodology - supposedly more scientific - is often given preference over the use of qualitative means of gaining knowledge" (27).
- 20% of the adult population participates in adult education each year (27).
- Regarding the future of Dutch adult education, "the more 'soft' sector of socio-cultural adult education will be forced to become market-oriented too and, by doing so, forsake its ideals of social emancipation" (31).

88. Western Labour Learning Network. "Into the 21st Century...Labour's Learning Agenda." *Basic Foundation Skills for Working People: A Trade Union Perspective Conference Report*. Calgary: Western Labour Learning Network, Canadian Labour Congress and National Literacy Secretariat, 2-3 Nov. 1997.

This conference report summarizes speeches made by individuals at the conference and outlines labour principles on workplace education. Of particular interest are the program overviews.

- The Workers' Education for Skills Training (WEST) program is an initiative run by the Saskatchewan Federation of Labour. Initial funding came from the NLS for a survey and for curriculum development and a series of pilot projects. "Currently, WEST is funded by a yearly grant from Saskatchewan Post-Secondary Education and Skills Training, and by substantial in-kind support from the Saskatchewan Federation of Labour (SFL) (24).
- The Winnipeg Labour Council Communications Skills Project "was presented with the goal of increasing the communication skills of delegates to the Winnipeg Labour Council (WLC) and/or encouraging the confidence of potential delegates to become active in the Winnipeg Labour Council as a result of their communications skills training" (26).
- "The mission of SkillPlan is to develop strategies to improve the basic skills of people working in the unionized construction industry in BC and the Yukon Territory" (28). This project is funded by six unions and two councils. "Local unions pay 1 cent per hour worked by their members. The councils pay 2 cents, reflecting 1 cent from the employer and 1 cent from the council involved" (28). SkillPlan is funded by government, fee-for-service, publications and collective

- agreements (29).
- The UFCW National Training Program and Training Centres receive funding through a grant of \$200,000 from the Canadian Office for Local Unions who: “have negotiated a cents-per-hour training fund; contribute one cent-per-hour to the National Training Fund; have established a training committee; and have appointed a training coordinator” (35).

89. William, John Douglas. *Literacy Skills of Canadian Youth*. Ottawa: Statistics Canada, HRDC and NLS, 1997.

This document tracks the literacy skills of Canadian youth (ages 16-25) using data from the IALS. Of particular use for the study of funding for training is the summary and conclusions section which provides nine principal conclusions from the work. Among the nine findings, most relevant for our purposes are:

- 6) “The ten provinces varied substantially in their literacy scores...Manitoba, Saskatchewan scored more than one year of schooling above the national average; British Columbia, Alberta, Nova Scotia, and Quebec scoring near the national average; and Ontario, New Brunswick, Newfoundland and Prince Edward Island scoring the equivalent of about one year below the national average.” (24)
- 7) “Although nationally females and males scored equally well on the three literacy tests taken together, sex differences varied among provinces. In New Brunswick and British Columbia, females substantially outperformed males, whereas in Ontario and Manitoba, the reverse was true” (24).
- 8) “The SES gradients (ie., the relationship between literacy skills and socioeconomic status) varied dramatically among the provinces. Quebec and the three Prairie provinces had relatively shallow gradients...Ontario British Columbia, and the four Atlantic provinces had relatively steep gradients” (25).

90. **Wilson, Fred. *Seizing the Moment to Finance Training: A union perspective on the Joint Union Management Program (JUMP)*. Training Matters Sources and Resources #00-01, North York, ON: Centre for Research on Work and Society, York University, 2000.

This interview was conducted July 1999 by D’Arcy Martin and Nyranne Martin, as part of the study which generated this annotated bibliography. In it, the key union strategist for the \$36 million pulp and paper sector training initiative in British Columbia reviews context, capacity building, change, collapse and continuity.

- “You can’t make sense of training in the pulp and paper industry without seeing it in the context of reinventing the whole forestry sector.” (1)
- “Of course, from our point of view, this was never an alternative to banging heads (with the employer), it was just banging more pointy heads.” (15)
- “The genie is out of the bottle, I think. We now have a cadre of activists who understand training from a union perspective.” (20)

91. Wolfe, David A. “Institutional Limits to Labour Market Reform in Ontario: The Short Life and Rapid Demise of the Ontario Training and Adjustment Board.” in Rodney Haddow and Andrew Sharpe, eds. *Social Partnerships for Training: Canada’s Experiment with Labour Force Development Boards*. Kingston: School of Policy Studies, 1997.

This article chronicles the establishment, structure and operation of the Ontario Training and Adjustment Board and examines the reasons for its dissolution in April 1996.

- “The government took the position that OTAB must enjoy effective control over both policy direction and program delivery in order to exercise effective responsibility over training in the province” (165).
- In July 1993, the Education and Training Minister, Dave Cooke, allocated the following funds to be governed by OTAB: “\$162 million for employment preparation, \$64 million for foundation skills training, \$62 million for adjustment programs, \$5 million for local board development and support, and \$13 million for administration” (173).
- The author attributes the demise of OTAB to the fact that “there was simply a surplus of factors working against it” (181).

92. **Wortsman, Arlene, *et al.* *Workforce Training Incentives: Options for Saskatchewan*. Regina: Saskatchewan Labour Force Development Board and Canadian Labour Market and Productivity Centre. May, 1999.

This study explores different options to increase investments in training. It draws on literature, interviews and analysis. It considers obligatory financial incentives, voluntary financial incentives and non-financial incentives.

- “Even where training expenditures are accurately and systematically measured, which is not the norm, they are conventionally treated as operating costs which must be reported in their entirety in the year in which they were incurred instead of as investments which are depreciated over the period in which the expected benefits from training accrue. This financial accounting framework tilts decisions against training and in favour of recruiting skills.” (9)

- “The literature reviewed above suggests several design features which can be applied to make a range of training incentives, including obligatory financial incentives, more effective in increasing training investment. These features include:
- Training consortia, which enable small businesses to pool resources and to develop partnerships with training providers (included in the design of the Quebec Loi du 1%, and recommended in the U.S. by the American Society for Training and Development);
- Improved access to labour market and training information, for instance by establishing one-stop access centers (as in several jurisdictions including Saskatchewan, Quebec, and very recently in the U.S.);
- Indirect targeting of incentives to favour disadvantaged individuals without stigmatizing them (as in the design of Job Start wage subsidies in Australia, and the Individual Learning Accounts in the U.K.)” (21).

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Training Matters is funded by the *Social Sciences and Humanities Research Council of Canada* for a period of five years. During that time, we expect to produce innovative research that critically examines the provision of training for the Canadian workforce. In addition to publishing books of collected articles on selected themes, we are publishing a working paper series to disseminate as widely as possible the research being conducted by members of our Network.

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