Transunion
Women workers

Strong women for transport

an ETF Gender Training Package

EUROPEAN TRANSPORT WORKERS' FEDERATION

Transunion is a EU funded project of the European Transport Workers' Federation

Imprint

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Collette Parsons, ETF Women's Committee Chairperson

Foreword

At the European Transport Workers' Federation (ETF) Congress held in Ponta Delgada in 2009, the ETF Women's Committee was tasked with raising the profile of women in transport and in transport trade union bodies. The result was a commitment by the ETF, the Women's Committee and the ETF affiliates to work together to achieve this, to raise awareness, to educate, to build union capacity, to address women's workplace issues and ultimately to have positive trade union policies.

The EU-funded project TRANSUNION tasked the ETF to develop and refine trade union policies, in parallel, in three distinct areas: climate change, young transport workers and promoting gender equality in transport. The ETF views these three pillars as essential in fostering sustainable transport in Europe.

The 'Women Workers' Pillar' enabled the ETF Women's Committee to develop a gender training package for workplace representatives and it aims to educate women and men in the workplace where there is no trade union, little or no union activity or where gender equality is not high on the bargaining agenda. It will assist ETF member organisations in the promotion of gender equality, whilst encouraging women to join the trade union movement and take up positions in union structures.

This is the first training package developed by the ETF Women's Committee where we hope to give you the practical tools you need to help you overcome the obstacles that exist in the workplace. We will give you the knowledge and skills you need to be able to put gender equality firmly on the collective bargaining agenda. The more women who become involved in the trade unions the more visibility we have. The training package is the culmination of the many contributions from union activists, workers' representatives, as well as rank and file members, and has been tested twice during the project at two dedicated gender workshops. The Women Transport Workers Conference (Sofia, October 2011) gave the opportunity to women leaders and union members to assist with the final input. We are indebted to all these participants for their contributions, expertise and for assisting with the development of the project... they really did 'make it happen'.

The training package comes at a time when opportunities are opening up to women transport workers, but where workplace culture is still very much male-focused and male-dominated. Industry and trade unions need to play a key role in improving the working and living conditions of transport workers and of women transport workers in particular. The social dialogue conference organised in the final stage of the ETF TRANSUNION project gave the opportunity to social dialogue partners from the different sectors to acknowledge that a joint effort is a 'must' in eradicating precarious employment and ensuring a sustainable transport industry - an essential prerequisite to encouraging women and young people to enter and stay in the industry. Women can have a strong voice, and by working together we can make a real difference, changing the transport industry for the good of all.

With this training package, the ETF and the Women's Committee hope to have greatly contributed by stimulating positive workplace gender equality action. The training package is designed with transport workers in mind and aims to focus on the issues that are of key importance in building up a modern transport industry in the Europe of the 21st Century.

We hope you will find it useful and enjoyable.

Collette Parsons
ETF Women's Committee Chairperson

NOTE: *You can find more about the TRANSUNION project here:* **http://www.itfglobal.org/etf/Transunion.cfm**

How to use the ETF Gender Training package

The aim of the ETF Gender Training Package is to encourage women at the workplace to participate more in trade union life, to empower them as future union activists and enable their participation in collective bargaining and negotiation bodies. Their voice must be heard, and their needs and interests must be addressed. Through training, and by working together, you can encourage and empower one another to make transport a better workplace for both women and men.

Who is this training package for?

This training package is a support tool for those trade union activists - women and men - who are keen to share and develop their knowledge and experience in the field of gender equality with other workplace colleagues. Women and men can equally be trainers and trainees. **From a trainer perspective:** you do not need to be a qualified trainer to use this training package. You just need to be interested and prepared to share and/or develop your knowledge of gender equality with your colleagues. **From a trainee perspective:** by nature of the topic (gender equality), you will find that with this training package reference to women is predominant.

Do not forget that the aim of the training is to improve gender equality at your workplace. When choosing the group of trainees, however, think of your workplace and, with this in mind, think of the best way to achieve this aim. You may consider involving a mixed group of colleagues, both women and men, or start the training only with women workers. In doing so, remember: training, as any other workplace activity, gives a key opportunity for women to meet with other like-minded colleagues and form networks.

How do you have access to this training package?

This training package will be distributed via your workplace trade union and will also be available in a downloadable version on the ETF website **http://www.itfglobal.org/etf/Transunion.cfm** and websites of its member organisations.

What is the structure of this training package?

The training package consists of two modules:

- **Module 1** is about empowering women by boosting self-confidence and developing skills and knowledge on workplace issues and gender equality in particular. It further guides women who aspire to take up positions in their trade union structures, and raises awareness amongst union activists on how to support women on their path to leadership.

- **Module 2** is about women in collective bargaining and gives guidance on how to include gender issues on the trade union negotiation agenda, one of the central themes of the module being work-life balance.

In spite of the two different themes, both modules are organised along the same line, look and structure. They are divided into **chapters**, each preceded by an introduction that gives a brief overview of the topic. The chapters include **Activities**, designed for plenary, small group or individual work. Each activity is followed by an **Example** that gives some hints and tips on how to deal with specific activity tasks. Some activities and examples will re-direct you to a so-called **Skills Workshop** , which is nothing else but step-by-step techniques meant to help you as a trainer to use the training package at its best.

How to use the training package?

The training package is designed to be used with great flexibility. Do the activities in a way that suits your time availability, and your workplace needs and interests. You can work your way through the training package successively, i.e. activity by activity and module by module, or dip into chapters and modules, choosing activities according to your needs and the needs of your colleagues. However, a number of activities build on each other and therefore they should be carried out successively. You will find this clearly indicated at the very beginning of the activity, under **"Before the training session"**. Activities are a mix of small group, plenary and individual work. This is specified – for each and every task – under **"During the training session"**. Usually, the activity starts in plenary, with a description of the tasks, followed by small group work. Participants are finally asked to meet again in plenary to share their findings and discuss further action. The advantage of working in small groups is that participants have more time to get involved and they speak more freely. No risk of good ideas being lost. However, should your group of trainees be smaller than 6, you may consider running all tasks in plenary, as opposed to breaking them up into groups of 2 – 3 persons each.

Each activity includes 1 to 4 tasks. They vary in number depending on the activities. Usually, the first few activities of each module are about fact-finding and information-sharing, while the others are about brainstorming and generating ideas. Some are role-play tasks. The last task will usually consist in asking participants to add their findings into the learning diary.

The **learning diary** is a personal account of the outcome of all the activities of the training package. Encourage each participant to keep a notebook where to mark the outcome of all activities – whether resolved individually or by group work and plenary. This will help them remember new things that they have learnt, acknowledge their progress with gender equality and identify problems associated with the topics or with the learning process. Each entry in the learning diary should follow the same simple structure:

- The number and title of the activity
- The date when the activity was performed
- The outcome of each task, using the suggested tools proposed in the examples that accompany each activity (charts, checklists, comparative tables, diagrams, etc.)

If you work with flipcharts or coloured paper during your training sessions you may consider taking photos of the drawings, etc. and encourage the participants to paste them into their learning diaries.

Some activities will require preparatory work. This will be indicated under **"Before the training session"**. If so, you will be advised to either distribute copies of the activity to participants before the training session, to encourage individual research, or to invite a union representative to attend the training session and provide you with the information you need in order to complete your tasks. If you choose to ask the trainees to research and prepare information, keep in mind that they may have little time for it, or may have limited knowledge about the right sources. If participants are not fully prepared when they turn up to the training session, agree together what is missing, why, and how to get the missing information, who will research what, and when you will meet again to share your knowledge. However, it is **advisable** to involve a trade union representative as a resource person for your training. This will also help strengthen the contact between the union and the workplace members. Remember to give her/him, in advance, a copy of the activity to help prepare the session. Ask your union representative to prepare a **brief information sheet** containing written material that answers the questions formulated in the activities and distribute this information to the participants after the training session. The information sheet should be included in the learning diary.

As for **materials and equipment** needed for the training session, these are kept to the essential and allow you to use what you have at hand, in your day-to-day work. You can run a training session with nothing more than copies of the activities, paper and pens to keep track of issues and good ideas. If you have access to flip chart paper, coloured paper, markers, etc., consider using them to display information when you work in more than one group. Encourage participants to bring their own notepads and pens, as this will enable them to keep a record of their ideas and use them during further training sessions and later on in the workplace (learning diary).
When planning your training sessions, it is essential to have an indication of the time required to complete the activities. An indicative, minimum duration per task is given at the end of each activity, under **"Time for Task…"**. When starting planning training sessions with your workplace colleagues, you will more than likely have to adjust it to your own time availability, the size of your group, etc. Prior to organising the training, it is always useful to ask your colleagues how much time they have for the training session. Remember to find the right balance between your availability and the time needed by your group to understand well and fulfil the required tasks. Do not rush through the topics and tasks, as this may weaken the purpose of the training and slow down the learning process.

Some activities refer to certain **Skills Workshops**. And if so, you will need first to check the Skills Workshop, as it will help you to prepare and run the activities. Remember, support yourself before supporting others.

To summarise, in order to make the training package easy to use, all activities are structured in the same way and include the following fields:

- **Title:** indicating the topic the activity deals with;
- **"Before the training session":** specifies whether the respective activity is a follow-up of previous ones and whether preparation is needed beforehand;
- **"During the training session":** indicates the way in which each task should be carried out: in working groups, in plenary or individually;
- **"Equipment and materials":** indicates on the resources needed for the activity;
- **"Tasks":** clear description and requirements of each activity;
- **"By the end of this activity":** describes in brief the learning value of the activity;
- **"What next?":** indicates how the outcome of the activity can be applied to your workplace reality to help you progress in a particular direction in the short-term or medium term future. It also indicates connections between certain activities of the respective module;
- Last but not least, **"Time for Task":** marks the timing that should be allocated to complete each task under the activity.

Each **activity** is numbered according to the module it belongs to and to the place it takes within the module. Thus, for instance, A1.2 stands for Module 1 Activity 2 and A2.8 stands for Module 2 Activity 8.

All activities are followed by an **Example**, as a support tool for you as a trainer. For more details of the examples, see below under **"Final remarks for you, as a trainer"**.

What do the symbols mean?

A small number of symbols will be used throughout this training package, to help you visualise better, and identify faster, some of the features mentioned above. These symbols are:


Activity


Skill workshops


Examples


Preparation before training

Final remarks for you, as a trainer

As already mentioned, **you do not have to be a trainer by profession** to use this training package. You just need to be willing and interested to go through activities before sharing them with your workplace colleagues, and guide them through fulfilling the tasks.

However, preparation is key. You do not have to spend hours researching but you do need to know the training package, the activities, the tasks, as well as the examples, before you take them to others.

Two distinctive tools have been included in this training package to help you in your trainer's mission: the Examples and the Skills Workshop.

The **Examples** are not meant to be distributed to the participants, but their function is:

- To provide you as a trainer with some ideas or with some additional hints and tips on how to actually fulfil the individual tasks of the activities;
- To provide a certain way to structure and/or visualise the findings, in order to make the learning process easier (checklists, comparative tables, diagrams, etc.).

You may find that some examples do, in general, reflect the situation in your workplace. Use them in such a way as to inspire participants to come up with their own findings. It is precisely why it is not recommended to distribute copies of the examples to the trainees. Learning and team spirit will be more valuable if you work your way through the training package via joint effort and debates, using your own capacity and skills.

As mentioned above already, the **Skills Workshop (SW)** is a basic methodology meant to help you as a trainer use the training package at its best. Read the Skills Workshop every time you see an explicit reference to it, either in the activities or in the examples. Each skills workshop is numbered so you can easily find it in the methodology. **SW1** on **How to run a group session** will be an essential tool when you prepare your first training session and thus should be read beforehand. SW 1 to 8 provide you as a trainer with valuable advice on how to handle the training package and its various activities. These Skills Workshops should not be handed out to participants. By contrast, SW9a to SW9d provide additional text for specific activities of Module 2 and will have to be distributed to participants.

The ETF Gender Training Package is a living document. Use it in a way that suits you best, to bring to light gender issues that are important to your individual workplace, your sector and your union. This will make it meaningful to you and your colleagues and will enable everyone to see how they can make a practical difference to gender equality in their own workplace.

You do not have to be a trainer by profession to use this training package. You just need to go through activities before sharing them with your workplace colleagues, and guide them through fulfilling the tasks. Share your knowledge and learning process with the others.

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SW 1

How to run a training session

Here are a few hints and tips that may help you run a training session.

Before the training session

Make sure that whoever is coming to the training session knows the following:

1. Where and when you are meeting;
2. How long the training session will take;
3. What you are discussing;
4. What is required from participants in terms of preparation.

At the start of the first training session

Once everyone is there, introduce yourself to the participants. You may want to explain why you have been inspired to take up the ETF Gender Training Package and share it with your colleagues. Next, ask the participants to introduce themselves. A good ice-breaking technique is by pair interviews: one participant interviews the one sitting next to her or him and the other way around. Then, they introduce each other in the plenary. Use the following questions for the pair interviews:

- What is your name?
- Where do you work?
- Any hobbies, pets, family and/or fun stories?
- What do you expect from this training session?

Please note that once people know one another, there is no need for further introductions except if you have new participants joining the training session.

During the training session

Key to any successful training session is the value placed on knowledge, experience and skills that each participant brings along. It is also important to set some ground rules from the very beginning. Ask those colleagues attending your training session to respect each other and work together. Tell them what you expect from them. Encouraged them to speak up but also:

- To listen to others;
- Not to interrupt other speakers;
- To make a constructive contribution to the activities;
- To be clear and concise in their contribution.

Once the rules are established, introduce the topic and activities of the training session. Here you may want to use the introductions of the respective chapters and sub-chapters that activities were selected from.

Next, start the activity. Go through the tasks with the participants making sure everyone understands them and is aware of the indicative timing allocated for each task. If participants need more time, allow for it. If required by the activity, split the participants into small groups and remind them to each appoint someone amongst themselves to report back to the plenary. Remember: ask all participants to take notes on the discussion and findings in their learning diaries.

If you have five participants or fewer, run the activity in one group; if you have more than 6 participants divide the participants into small groups.

When participants work in small groups, it is advisable for you to go from one group to the other and see whether the task is well understood, how the discussion is going on, if there are any additional questions needing clarification.

Breaks

If you have a training session that lasts more than an hour, it might be good to have a small break. You may want to arrange in advance with your participants to bring some snacks and refreshments to the training session. Whatever you decide, breaks are important as they allow for informal interaction and networking.

SW 2 Checklist

This type of checklist follows the concept of an action plan and is more detailed in asking those questions you need to answer when considering to follow certain steps, in a certain sequence, in order to improve or change a given situation.

Steps	Questions	Issues/ Ideas
1.	**What do you want to achieve** List desired achievements at random.	Issue 1 Issue 2 etc.
2.	**Prioritise** Now list the identified achievements in order of their importance for you.	Priority 1 Priority 2 etc.
3.	**How will you achieve your set priorities?** Deal with one priority at a time. List the necessary steps you need to take in order to achieve each priority.	Step 1 Step 2 etc.
4.	**Once you know HOW to achieve your set priorities, determine:** Who coordinates the plan? Who does what and when?	
5.	**Who** do you need to contact, talk to, win as an ally, etc.	
6.	**Other considerations?**	

SW 3 Dealing with discrimination - 10 Tips

1. **Everyone has a right to be treated with dignity and respect.** Discrimination at work can take many forms including:
- being singled out and subjected to offensive language, jokes, insults
- unfair work allocation – being given worse jobs or overworked compared to others
- being denied training or promotion
- unfair complaints against
- being singled out for redundancy

2. **Discrimination can come from anyone** – your boss, your colleagues, customers, clients and service users. All such incidents are illegal. There are no excuses.

3. **Take action immediately.** If you feel able, tell the person to stop.

4. **Keep detailed record** of incidents in detail.

5. **Ask any witnesses** to note down what they saw and heard.

6. **Get advice** from your trade union. If you believe you have suffered discrimination in the workplace contact your trade union representative.

7. **Report discrimination to your employer**, either yourself or through your union representative. A good employer will have an equal opportunities policy in place at work. There should be internal procedures for filing a complaint as a first formal step to registering the fact that there is a problem.

8. **Whoever you report to** must make certain that your complaint is investigated and that something is done about it.

9. **Don't give up – get support and good advice.** If matters cannot be resolved internally you may need to take your case to an employment tribunal. Remember the burden of proof lies with the employer – they have to prove they have not broken the law. Act quickly – remember there are strict time limits within which to make a claim.

10. See whether your colleagues have experienced gender discrimination and **take steps to deal with this collectively.**

SW4 Questioning techniques

Here is a quick introduction to questioning techniques you can use when facilitating discussions or negotiating with management. Being able to question well is a valuable skill for a trade union representative or a leader.

Open questions: These questions are used to explore facts and gather information without an outcome predetermined by the questioner. It gives the receiver an opportunity to raise any concerns they may have.
Example: 'How does the management feel about 'lack of gender equality in pay?'

Probing questions: These are used to follow on from open questions and explore a particular area in more detail. They can be used to check information and are excellent to get the receiver talking about what they truly think about a subject. They are useful when you want to focus the discussion on a more closely defined topic.
Example: `Tell me more about how you propose to introduce these health and safety measures.'
One of the problems with probing is that when used without care the other person can feel under interrogation and become closed and hostile.

Hypothetical questions: Useful for exploring potential scenarios and identifying difficulties before they occur.
They work by putting the other person in a situation and asking them to speculate on what they would do next to resolve it.
Example: 'Let's say our members do not agree to a reduced pay increase this year. How would you handle the situation?'
Too many hypothetical questions may lead to unpredictable answers, as you get further away from reality. The employer may hypothetically promise a lot but in reality deliver very little.

Closed questions: Can be useful for fact finding and confirming what you have heard. They are questions for which there is only one definitive answer. They can be useful for regaining control from a talkative employer, clarify the agreements reached or to change the subject to another topic.
Example: 'How many times a year shall we meet to monitor Equality and Diversity policy?'
If overused, closed questions will also turn the discussion into an interrogation. The questioner will only receive answers on the topic that they want. It leaves little room for the other person to feel they are jointly contributing to the conversation.

Multiple or marathon questions: These are a number of questions strung together without any pause to reply. They are often used because the questioner is musing aloud and hasn't focused on what they want to know. It shows lack of preparation.
Example: 'Is the management proposing an open meeting to discuss the facilities? How will that be organized? Who will be the person chairing the meeting? Will workers get time off to come to this meeting?'
These questions tend to confuse the issue and allow the employer to answer only the question they want. If you want to probe a particular area, ask a single question and wait for the response.

Leading questions: They tend to direct the other person into responding in a particular way, usually in the direction that the questioner wants to hear. So you will NOT find any new information if you ask these questions.
Example: 'I think that crèche facilities at work are a good idea - how should we introduce them?'
Here, you are not giving people an opportunity to discuss the idea before asking for how it should be implemented.

The trick question: This is where you set the other person up. They will feel damned whichever way they answer the question, so be very careful about using it. It does not build relationships.
Example: 'Have you stopped bullying your staff yet?'
Trick questions are best avoided.

SW 5 Responding techniques

There are various ways of responding when you are in a meeting or conversation. Not all of them have to be in words.

Paraphrasing: Restate in your own words the basic themes involved in what they have been saying. Use fewer words than the original - aim for a précis of what's been said.
Example: 'So what you are saying is...'
'If I understand correctly, your main argument is that...'

Reflecting: Put back to the person what you have picked up of what they are feeling about what's going on. Reflecting is often about sharing your hunches about what is being felt but not expressed.
Example: 'Sounds like you are really angry about this?'
'My guess is that you were worried by this approach?'

Clarifying: Openly put your doubts about what is being said to the other person.
Example: 'I'm not too clear about this. Could you tell me a bit more?'
Take care when phrasing. 'So what you are trying to tell me is ...' may be implied as criticism. It is better to say you are not clear about it working out, being adopted and so on.

Echoing: This simple technique is excellent for prompting further discussion on one of the points that has been raised. It involves picking up and repeating a key word with a slight questioning tone.
Example: 'Pay decrease?' 'Enhanced working conditions?'

Silence: Not saying anything can be an active response. It allows the other person to think, and demonstrates that you really want to hear what they have got to say. If you find silence uncomfortable, try using an encouraging sound.
Example: 'Ah-h a' or 'Uhm m m!'

Summarising: Pull together all the facts and ideas that have been covered so far in the discussion. Summarising is usually easier if you have made attempts to paraphrase earlier. Again you are not after a verbatim recall. Focus on the main themes.
Example: 'So, what we've identified so far are three main reasons for why women do not participate in staff training.'

Focus: Make a decision together on the future stages of the discussion. Having shown you were listening, this helps control of the conversation and gives it a sense of direction and purpose.
Example: 'Shall we deal with the current problems caused by contractors first and then talk about the long-term plans?'

SW 6 Contributing to negotiations

1. What is the topic you are preparing?
Establish exactly what the subject of the discussion is. Is it on the Agenda for the meeting or will you bring it up under Any Other Business? Consider where best to make your contribution.

2. What is the purpose of your contribution?
Are you supporting someone else, introducing a new idea, clarifying a subject, justifying a request or representing the views of others?
The purpose of your contribution will determine to some degree how you make your presentation.

3. What information do you have or need?
To support your contribution you may need information - facts and figures, opinions of people who you are representing, background documentation (eg copies of forms). Give yourself time to collect this information.

4. How do you present your information?
If there is a lot of background information - particularly figures - it is sometimes a good idea to circulate copies before the meeting, perhaps with the agenda for the meeting. If you are going to present the information at the meeting consider the best way to do this:
- Talk from prepared notes
- Distribute papers - make sure you have enough copies for everyone
- Use visual aids – PowerPoint, flipchart or slides - know how to use them

5. What are your own views and opinions? How will you justify them?
It is important to plant your ideas in other people's minds so that they will be supportive. Think through before the meeting what arguments you will use to justify your views.

6. How will other people react?
Try to put yourself in other people's shoes and anticipate the sort of questions they will ask. You might want to "sound out" some key people before the meeting so that you can prepare for any awkward questions and have your answers and justifications ready. Having the Chair on your side is obviously very helpful - let him/her know you will be raising a topic and, if appropriate, ask for support. Even if s/he does not support you, at least you will know where you stand!

SW 7 How to chair a meeting

Preparation

- Check over any previous papers /minutes
- List the main topics
- Decide if a meeting is needed
- Organise the time and place
- Decide who needs to be present /what info will be needed
- Prepare the agenda, with approximate times for each topic
- Inform people about the meeting, and any preparation they should do
- Prepare copies of supporting documents and the materials needed (notebooks, pens)

Running the meeting

- Start on time
- Welcome people
- State the purpose of the meeting
- Work through each agenda item:
    - Introduce each topic
    - Lead the discussion
    - Summarise points made
    - Ask for a proposed decision, or propose a decision
    - State the decision made, and the action to be taken
- Remain impartial as far as possible.

After the meeting

- Ensure an accurate record of the meeting is prepared
- Ensure the record is circulated promptly

SW 8 Role-play and fish bowl observation

In general, role-plays create a situation where participants can experience different roles and view the situation under discussion from different perspectives. In an ordinary role-play, the participants portray a certain role as a way of experiencing this role.

In a fish-bowl observation, the other participants observe and analyse the behaviour of those who are playing their roles. This way, participants have the opportunity not only to act out different roles and view a certain situation from different angles, but also to become more critical of the situations by analysing the players' behaviour.
Hence, the advantage of this form of role-play is that it makes tasks more interactive: on the one hand participants are given the opportunity to act out certain roles while on the other hand the viewers also play an active role in responding to the role-play and relate to each other.

In preparing the role-play and the fish-bowl observation please follow the steps listed below:
1. Step: Inform the participants that you are preparing to conduct a fishbowl role-play and this role-play format might differ from their previous role-play experiences.

2. Step: Ask the participants to prepare the role-play as explained in the task.

3. Step: Set up the chairs in a circle with 2-4 chairs in the middle, facing each other.
The number of chairs in the middle depends on the number of players.
This is where this role-play format gets its name from. It is as if the role-play participants who are seated in the middle of the circle are in a fish-bowl, carefully observed by those sitting around them.

4. Step: Ask the first group to take their seats in the middle of the circle while the other participants will be seated on the chairs around them. The role-play group needs to indicate before it starts who plays what role. The others, watching the performance, observe and take note of the following:

- Facial expression and gestures of the players;
- Key findings and arguments.

5. Step: At the end of each role-play tell the players that they can now step out of their roles and become observers for the other groups. Ask every player how s/he felt in her/his role?

6. Step: After each performance, ask the observers to give feedback on the above mentioned points and start a discussion about the role-play with a focus on the players' behaviour as well as on the key findings and arguments.

7. Step: Repeat steps 4-6 until every group has performed its role-play.

8. Step: At the end of all performances, summarise the main points and discuss with the participants which of the arguments provided in the different role-plays were most convincing.

SW 9 Supporting texts for activities

SW 9a A2.3. How does a collective agreement come about?

Rules for collective bargaining [1]

When trade unions and employer associations sit down together once a year to negotiate higher wages and/or better working conditions, there are certain rules to be followed. Collective bargaining begins with a first series of meetings of the two sides. This is the time when the union may have to apply pressure, as it is important for negotiations to get on the right track from the very beginning of the process.

When this first round of negotiations is successful, a new collective agreement can be quickly signed. However, when no compromise is achieved, it is very likely that one of the parties declares the negotiations to have failed, thus opening the door to arbitration through a neutral arbitrator. When arbitration also ends with no compromise the so-called peace obligation ends. The arbitration is declared to have failed and the unions call on their members to vote on strike action.

If members come out in favour of strike action - as is normally the case -, strikes then start taking place in selected companies and regions, with union members downing tools. In certain cases employers react with selective lock-outs, putting pressure on the strikers. How long this interplay of strikes and lock-outs lasts is not predictable, and is generally dependent on how far apart the two sides are. Further factors are obviously the size of the strike fund, and members' willingness to strike.

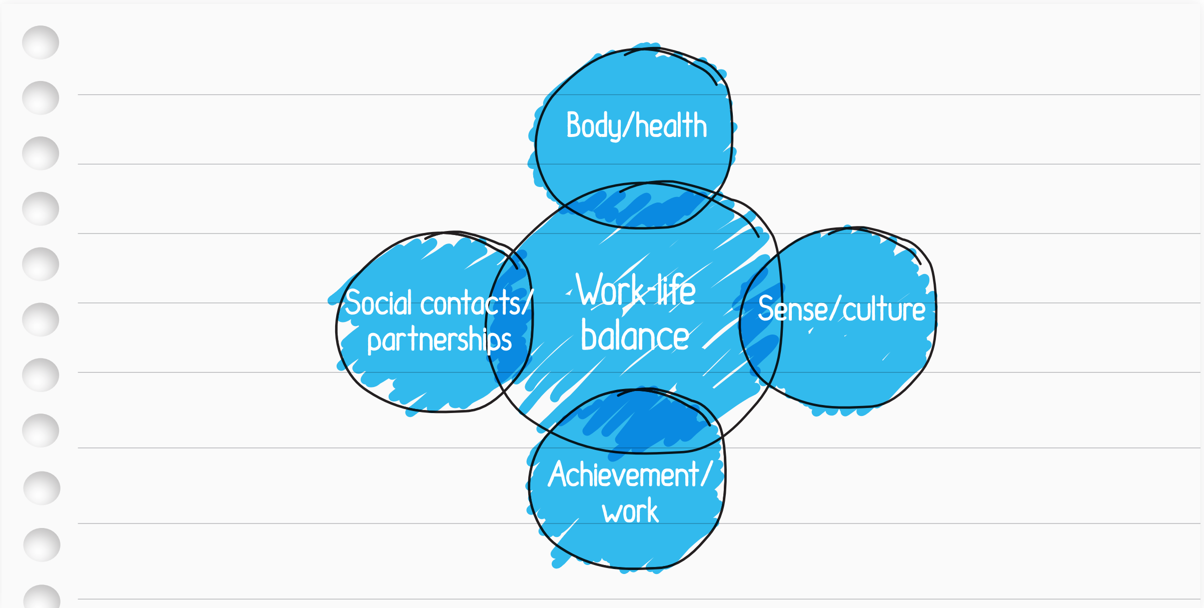
Generally speaking, the two sides will restart negotiations after a certain strike duration, with agreement being quickly reached in most cases. This agreement is then voted on by union members. Once members accept the compromise, the strike action is terminated. The points agreed are then written down in a new collective agreement, which comes into force on an agreed date. From this date on, all employees of the sector and region covered by the agreement benefit from the agreed improvements.

[1] Source: Andrea Scherz

sw 9b A2.6 Assessing work-life balance

Example of work-life balance model

There are many aspects of life that matter for everyone. It is acknowledged that the following four areas of human life must be, over a longer period of time, in a balanced relationship with one another to ensure personal physical and mental health, as well as life stability (work-life balance).



The four areas, which need to be in equilibrium to help people achieve a decent work-life balance, can be described as follows:

- **Body & health:** nutrition, recreation, relaxation, fitness, life expectancy;
- **Achievement & work:** commitment at the workplace or in other fields of activity, money, success, prosperity, wealth;
- **Social contacts & partnership:** maintaining relationships with friends, colleagues, family, affection, recognition;
- **Sense & culture:** space for thoughts, intuition, new ideas, self-realisation, fulfilment, love, future issues.

This example is based on the balance model of the neurologist and psychiatrist Nossrat Peseschkian. [2]

[2] Source: Andrea Scherz

SW 9c

A2.10 Getting to know different negotiation styles and tactics

Generally speaking, negotiations are based on three major styles.

Three negotiation styles [3]

1. Hard negotiation style
- Attitude: negotiators position themselves as opponents and the negotiation process is confrontational;
- Aim: seeking victory over the opposite side;
- Behaviour: mistrust, pressure, reluctance to make concessions, demanding unilateral concessions.

2. Soft negotiation style
- Attitude: negotiators as partners;
- Aim: seeking agreement with the opposite site and avoiding personal conflicts;
- Behaviour: trust, diffusing pressure, openness, insisting on agreement.

3. Poker
- Attitude: There are winners and losers - only one can prevail;
- Aim: seeking to win;
- Behaviour: sometimes hard, sometimes soft, depending on the course of negotiations.

The three styles above are about the positions taken by each side involved in the negotiation process. This means they focus on winning and losing, winners and losers.

Union experience shows that collective bargaining negotiations must remain focused on workplace rights and how to get them, rather than on the negotiating partners.

For activities A2.10 to A2.13, the training package chose as point of reference a fourth negotiation style that encompasses the ones above. This is the so-called *Harvard concept of principled negotiation,* which is process-oriented and issue-oriented and aims at achieving a win-win situation, i.e. both sides will be winners. The behaviour required by this style is to be hard on the matter and soft on the people.

This fourth negotiation style, as it has elements from all the others, may be the suitable way to achieve basic negotiation skills and understand a wide range of negotiation tactics. In practice, the negotiation style will depend on many factors such as: your trade union tradition in CBA negotiation, the collective bargaining team, the attitude of the employer, etc.

[3] Source: Andrea Scherz

Do not forget that the aim of the training is to improve gender equality at your workplace.

SW 9d A2.11 The Harvard concept in collective bargaining

Here is a negotiation style which combines elements from the others (hard, soft, poker) and which may be the suitable way to achieve basic negotiation skills and understand a wide range of negotiation tactics.

The Harvard concept of principled negotiation [4]

A research team from the USA University of Harvard analysed for many years a variety of negotiation cases - from everyday problems to collective bargaining - and, based on this research, developed the so-called Harvard concept of principled negotiation.

The aim of the Harvard concept is to achieve a win-win situation taking into account the mutual interests of the negotiating parties. The negotiations according to the Harvard concept should be hard and soft at the same time - namely hard on the issue and soft on the negotiating parties.

The guiding principles (steps) of the Harvard concept are as follows:

1. Separate the people from the issue/problem

The purpose of this step is to recognise that progress in negotiations is difficult if emotions become part of the issues under negotiation, as this will adversely affect the ability to see the other party's position clearly. Two negotiating parties can only reach a good solution on the factual level if the relationship works between the two. It is important to build trust in the negotiations. Hence, this step involves:

- Clarifying perceptions;
- Recognising and legitimising what is in it for each of the negotiating parties;
- Communicating clearly.

2. Focus on the interests of the parties involved and not on positions

For this step it is important to distinguish between interests and positions. Interests are the reasons for a decision while a position is a point of view which has been chosen after deliberate thinking. The aim of this step is to clarify the own interests and the interests of the other negotiating party, to identify the objectives and to move forward with the negotiation process.

Example: Two children are fighting over an orange. Their parents ask them why they want the orange. One wants the orange to eat it, while the other wants the peel to bake a cake. By clarifying the interests, in the end the two children sharing the orange is no longer an issue to argue for: one will have the peel while the other will get the flesh.

[4] Source: Andrea Scherz

The initial position of the parties may not fully express what the parties really want and therefore it is essential to:

- Ask questions to explore the interests of the other negotiating party;
- Talk about your own interests.

3. Develop various options for mutual benefit

In this step it is for the parties to set aside time together to look for common interests or solutions. The idea is that the parties contribute together creatively to generate possibilities for mutual gain.

This step involves:

- Brainstorming;
- Broadening options;
- Looking for mutual gains.

4. Develop objective decision criteria

The final step is that all parties involved in the negotiations need to agree on fair criteria and procedures, which can be used as objective arguments to make decisions.

However, if no acceptable solution is in sight or can be reached:

5. Develop a Plan B or a best alternative

Towards the end of the negotiation process, there are many cases in which negotiators cannot reach a decision, simply because they have not thought of a Plan B from the very beginning.

When you negotiate, you should always prepare a Plan B or best alternative. One possibility could be to officially declare that the negotiations have failed and prepare for strike (if appropriate). Another possibility could be to continue the negotiations but to move on to another less controversial topic where agreements can be reached more easily. You can then come back to the harder-to-achieve issues.

The Harvard concept is one of many negotiation concepts. This training package does not promote it as a one and only concept but instead gives it as an example which can help most in achieving the required broad overview of the negotiation process. In practice, the negotiation style will depend on many factors such as: your trade union tradition in CBA negotiation, the trade union team involved in collective bargaining, the attitude of the employer, etc.

This training package is a support tool for those trade union activists - women and men - who are keen to share and develop their knowledge and experience in the field of gender equality with other workplace colleagues.

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