

INTERVENING IN INFORMAL LEARNING: ACTIVITY THEORY AS TEACHING TOOL

SUSAN L. CARTER *University of Toronto*

ABSTRACT. In this article, I argue that a concentrated focus on everyday informal learning about unions is critical not only to re-thinking union education programs, but to the overall project of union renewal. The article offers, by way of example, an inquiry into the grievance system as a routine (and central) union practice and a key site of informal learning. This inquiry is directed by cultural historical activity theory (CHAT) which provides method, tools, and theoretical building blocks for better understanding everyday learning. In addition, I argue, CHAT presents a powerful pedagogical tool for educators, leaders, and activists who are concerned with the challenge of intervening critically and strategically into everyday learning and everyday practices of unions and their members.

INTERVENIR AU CŒUR DES APPRENTISSAGES INFORMELS : LA THÉORIE DE L'ACTIVITÉ COMME OUTIL DE FORMATION

RÉSUMÉ. Dans cet article, j'affirme qu'accorder une attention particulière aux apprentissages informels réalisés au quotidien au sujet des associations syndicales est essentiel non seulement en ce qui a trait à la refonte des programmes de formation syndicale, mais aussi dans une perspective globale de revitalisation syndicale. Afin d'illustrer ce principe, l'article propose une incursion au sein du système de traitement des griefs en tant que pratique routinière (et centrale) et comme lieu propice aux apprentissages informels. Cet examen est effectué à l'aide de la théorie de l'activité culturelle et historique, théorie qui offre une méthode, des outils et des assises théoriques permettant une meilleure compréhension des apprentissages quotidiens. De plus, je soutiens que la théorie de l'activité, influencée par les contextes culturel et historique, constitue un outil pédagogique puissant pour les formateurs, les porte-paroles et les activistes vivant le défi d'intervenir de manière critique et stratégique dans les apprentissages et les pratiques de tous les jours des organisations syndicales et de leurs membres.

Union education is largely under-theorized. At the same time, learning theory is under-utilized in union education. This paper offers a cross-disciplinary meeting of social movement learning theory, adult education theory, and informal

learning theory. It is intended to contribute to a small but growing interest in expanding the use of sociocultural learning theory in union educational practice (Worthen, 2012) by building on the limited, but significant scholarly literature on informal, everyday (situated) learning in unions (Carter, 2012; Cooper, 2005; Krinsky, 2007; Sawchuk, 2001, 2002, 2013; Worthen, 2008), and makes practical recommendations for the use of informal learning theory in formal union education initiatives. As social movement learning theorist Foley (2001) argued,

We need to get on with the difficult and rewarding work of trying to understand what people are actually learning in the places where they work and live. And of course, considering the implications of that learning for our educational interventions. (p. 86)

Fully attending to everyday union and workplace practices through the lens of learning theory offers an important window for organized labour's leaders, activists, and educators to 1) consider routine everyday union activity – informal learning – as the crux of union education, and 2) to re-position formal union education programs as interventions into this much broader learning context. The bulk of worker and union learning is situated in the routine (and exceptional) encounters workers have with co-workers, supervisors, union stewards, clients, products, technology, work practices, processes, machines, rules, conventions, space, and so on. Adult educator Thomas (1991) spoke of education as a small craft, floating upon a sea of learning. Our challenge as educators is to adequately interrogate everyday activity. In the case of a union, that will include grievances, strikes, collective bargaining, organizing, union elections, workplace harassment policies and procedures, union meetings, conventions, etc. We can adopt what Foley (2001) referred to as a “strategic learning approach,” which

sees learning as complex (formal and informal, constructive and destructive), contested and contextual. It assumes that critical and emancipatory learning is possible and necessary. It asserts that a first step to their realization is an honest investigation of what people are actually learning and teaching each other in different sites... it insists on rigorous analysis while offering a practical way of linking analysis, strategy and skill. (p. 84)

Shifting the gaze to everyday learning does not simply mean we take seriously *what* workers learn about unions, labour relations or the capitalist system, through everyday interactions, but that we also deeply investigate *how* that learning occurs. Taken together, *the what and the how* offer potentially new ways of thinking about both the everyday *collective* learning and practices of unions, and the tacit, self-directed, incidental, integrative (Bennett, 2012) (and sometimes transformative) learning of *individual* union members. A sociocultural analysis of informal learning, particularly that informed by cultural historical activity theory (CHAT) provides a critical (and useful) lens for thinking through routine and strategic practices of unions and union educa-

tion (Krinsky, 2007, 2008; Sawchuk, 2001; Worthen, 1999, 2008). By deeply honouring and inquiring into learning processes of workers, CHAT further offers new tools to engage members as educators, and provides a new angle for thinking about union pedagogy in both formal and informal learning (Carter, 2012; Wills, 2012; Worthen, 2012).

This paper will focus on the grievance process – a place of contradiction, conflict and differential power, and a key site of informal learning. As a routine everyday practice of unions, the grievance process merits substantial inquiry by social movement theorists, radical adult educators of any stripe, and most particularly union educators, activists, and leaders.

SOCIOCULTURAL THEORIES OF LEARNING AND CULTURAL HISTORICAL ACTIVITY THEORY – SOME BASICS

Sociocultural theories of learning understand learning as deeply historically and socially situated and as active social and / or collective processes (Lave, 1996), starkly differentiated from a view of learning as an individual cognitive pursuit or outcome. As social movement learning theorist Kilgore (1999) noted,

A theory of collective learning is more appropriate than individualized theories for the study of individuals and groups engaged in collective action to defend or promote a shared social vision.... Individualized learning theories do not adequately explain a group as a learning system, nor do they necessarily situate the learning process correctly between “knowing” and “doing.” (p. 191)

Within the sociocultural learning theory tradition, and with its roots in Vygotskian and Marxist theory, CHAT has emerged as a suitable methodology and important analytic / conceptual tool for understanding *how* learning occurs in everyday activity. CHAT is based in a series of key ideas that emphasize the dialectical relationship (two-way / mutual-interdependence and influence) between the individual and her world as mediated by *object / motive* and by *tools* (or “*artefacts*”) (Vygotsky, 1962; 1986). Every day we act within and change our environment or circumstances by using the tools that are available to us – whether they are the tools of language and tone, symbolic tools like currency, or physical tools such as computer programs and crowbars. When the tools we have do not work, we improvise, or create new tools, or modify our objectives; in other words, we learn. Activity theory draws our attention to how learning, agency, and identity are shaped through activity and helps us understand the various elements most especially at play during moments of change, conflict, innovation, learning, transformation. Krinsky (2007, 2008) adopts an activity theory framework to understand informal learning in social movement campaigns. Krinsky (2008) explained

CHAT emphasizes, above all, the activity of actors toward objects or goals. Like pragmatism, CHAT focuses on interaction among actors who have objectives and who identify and try to solve problems. The unit of analysis, however,

is the “activity system” which includes artifacts, rules and divisions of labor that mediate this activity, rather than the individual ‘mind’. Accordingly, CHAT does not begin with an individualist notion of cognition but rather treats cognition as inherently social and linked to inherently social activities. CHAT allows us to begin to understand, in a way difficult to do otherwise, what happens when activists or authorities change their minds, change tactics, and blend or adhere to central tendencies in repertoires. (p. 30)

Activity systems describe the complex mediated processes of learning. Mapping an activity system (Figure 1) can be a useful organizing exercise for understanding how different outcomes and learning emerge from what is ostensibly the same activity system.

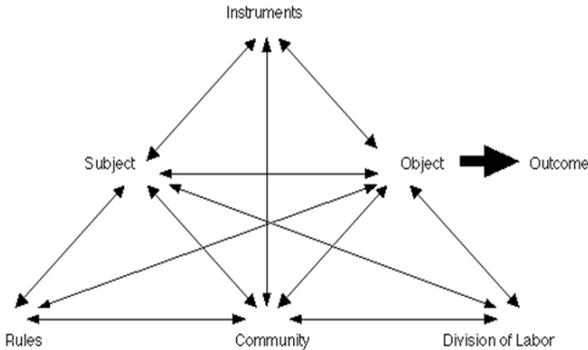


FIGURE 1. Activity system diagram (Engeström, 2001)

In a CHAT diagram, the *subject* refers to the viewpoint or standpoint from which we are analyzing learning in the activity system. It may be individual or collective; activity systems are “multi-voiced” (Engeström, 2001). In CHAT terms, *object / motive* refers to the overall purpose of the activity (as differentiated from goals which relate to specific actions, Leont’ev, 1978). *Tools*, or *artefacts* (also referred to as *instruments*), are the resources we grab onto or improvise in our effort to meet our *object / motive*.

The mediating tool can be external (e.g. hammer) or internal (e.g. ideas). It can be a sign, procedure, machine or method. Tools are socio-cultural specific, in that they are influenced and dependent on social experience and cultural knowledge. They are created and transformed during the historical development of the activity itself and carry with them a particular culture - historical remains from their development (Kaptelinin & Nardi). (Coverdale, 2009, sec. 4.4)

Community includes those individuals (and collectives) who share the same overall purpose, and are engaged in the activity system. *Division of labour* refers to both the type (i.e. collective, hierarchical, volunteer, etc.) and the arrangement of

division of tasks (who does what). Power may be most visible in (though not limited to) the division of labour in an activity system. *Rules* refer to explicit and implicit, formalized and “hidden” norms and conventions that both afford and constrain activity and relations within an activity system. We can borrow from Bostrom (2004) who differentiated between three kinds of rules:

directives, which are mandatory and issued by regulators with formal authority; norms, which are more implicit, internalized, and taken for granted in a social context; and standards, which as directives are explicit and have an apparent source but are presented as voluntary. (p. 77)

Mapping an activity system provides us with a means of investigating learning and development as it takes shape based on changing *object*, *subject*, and *tools*, *division of labour*, *rules* and *community* (what Sawchuk, 2011, referred to as kaleidoscope in motion – where *rules* become *tools*, and so on). These are useful categories – the more so if we consider them as activated, historicized, and malleable, not static. A CHAT analysis, based on recursivity within and between activity systems, facilitates the exploration of ways in which learning is mediated. How do historic, social, cultural, collective processes operate between people, relative in time and space to produce learning? In the following section we will consider each element of an activity system in turn, as it relates to the grievance system. But first, a word on expansive learning.

Expansive learning, according to Engeström (2001), is that which occurs in the search to find resolutions to conflict or contradictions that arise within activity systems. Krinsky (2008) explained:

The second basic premise [of CHAT] after the social nature of cognition is that elements of an activity system do not fit perfectly together and will eventually come into conflict or be unable to help actors solve problems. Solutions to these potential contradictions within the system produce, over time their own new contradictions. Thus there are dialectical tensions produced within the dialogic contexts of problem-solving that results in changes of mind among activists, influencing both their reconstructions and their prospective considerations of their activity.... This kind of inquiry becomes important for explaining the reasons that various actors adopt, drop, or try to modify the claims they make. (p. 30)

Thus a CHAT analysis supports social movement learning theorist Kilgore’s (1999) contention that “conflict is crucial to collective learning” (p. 199). This is further articulated by Sawchuk and Stetsenko (2008) who argued for a non-canonical reading of CHAT which emphasizes transformative learning. As they noted (see also Stetsenko, 2008), activity systems – and more specifically contradictions within activity systems – generate transformative learning, as individuals and collectives work to understand and resolve tensions, creating new artefacts, new objects, rules, communities, and divisions of labour, in the drive to change.

Engeström (2001) offers important distinctions between primary contradictions (which deal with fundamental / broad systems of oppression, i.e. capitalism, and which upset the *object / motive*); and secondary and tertiary contradictions (which pertain to in-system, or operational conflicts, at the level of goals).

In other words, the distinction lies in whether we are orienting to the problem with the project itself (primary contradictions), or to solving the problems that would help the project achieve its purposes more effectively (secondary and tertiary contradictions) – an issue that is recognizable in political critiques more broadly as revolutionary versus reformist concerns. (Sawchuk, personal communication, March 8, 2011)

The grievance system, to which we will now turn, involves, surfaces, and invokes contradictions at all these levels, making it ripe for analysis of informal learning. The following section provides a short “walk through” of the possibilities for analyzing learning in the grievance process as activity system, in an effort to illustrate activity theory’s potential as a critical reflective pedagogical tool of inquiry to be shared with activists and educators committed to democratizing “reflection on practice” (Freire, 1998) in unions and to finding new ways of intervening meaningfully in informal learning.

CHAT diagrams can run the dual risk of becoming either reductionist – where “mapping” is followed didactically not heuristically, as intended (Engeström & Sannino, 2010) – or overly complex (multiple activity systems as the base unit of analysis and dialectics shot through and across at every angle). The latter can lead to endless theorizing of near-inexhaustible permutations and combinations of mediating factors afloat in the aforementioned “kaleidoscope” (see also Niewolny & Wilson, 2009). Nevertheless mapping an activity system, or systems, is a solid organizational and pedagogical activity. An activity system analysis of the grievance process takes us a giant step forward in surfacing contradictions within a routine practice that in the field of Canadian labour is all but taken for granted, and is not generally viewed through a learning lens at all.¹

ASSESSING THE ROUTINE: GRIEVANCE PROCESS AS ACTIVITY SYSTEM

[We can investigate] the extent to which everyday experiential learning reproduces relations of exploitation and oppression, and the extent to which it does, or can, resist and help to transcend, such relations. (Foley, 2001, p. 85)

Workers experience injustice on the job each day. For workers who belong to unions, some opt to enter into a formal grievance process in an effort to resolve the injustice. What they learn and what the union learns in the process should be of primary interest to trade union activists, leaders and shop stewards, as well as to radical adult educators, including, but not limited to those who teach grievance handling. Also of interest is why some workers do not grieve: what have they learned (and how), that makes them decide

against activating systems apparently available to them? In this section we will interrogate the grievance process both as a key repertoire (tool) of unions and as a key system of activity in which literally thousands of Canadian workers engage each year, in an attempt to change their circumstances.

Two important points must be made before proceeding. First, the distinction between *grievance as workplace injustice* (in the vernacular sense and as experienced by a worker) from *grievance as articulated in social movement literature* (McCarthy & Zald, 2003), from *grievance in its specific (and narrow) labour-relations context* is a question of meaning making, and part of what is attended to here.

Second, activity systems must be understood in relation to one another and in their historical context and complexity – in this case, the grievance activity system is nested in the collective bargaining activity system, which is nested in the workplace activity system, legal frameworks, and the broader context of labour-capital conflict. Canadian labour law prohibits the union's use of key tools such as slow-downs, work stoppages, work refusals, stay-aways, sit-downs, walk-outs, and so on during the life of a collective agreement. In “exchange” for giving up the right to strike – broadly defined to include any and all collective industrial action – during the course of a collective agreement, unions gained increased leverage to enforce negotiated language through an expanded use of the courts (Fudge & Tucker, 2009); today's grievance process must be understood in the context of that compromise.²

Understanding these “multiple and composite systems” (Krinsky, 2008, p. 7) as our base unit of analysis (Engeström, 2001) is critical to building an understanding of the particular role the grievance system plays in challenging / (re)producing labour relations, and in building labour movement learning, participation and capacity. And, as social movement theorists remind us, “in the case of collective action repertoires, discursive repertoires are developed interactionally with opponents and targets” (Tilly in Steinberg, 1998, p. 857); the grievance activity system exists in tension with the activities and meaning-making of employers, governments through labour laws, and arbitrators.

Although all of this may seem patently obvious to labour movement activists, when we turn to the question of how the grievance system operates, it becomes clear that this broader context and historical trajectories can sometimes get lost, even in the teaching of the grievance system to new shop stewards. Learning in activity systems is mediated by both broader socio-historical political and economic contexts, and by the individual biographies of those involved. Thus it opens up an analysis of learning that is both intimate and far-reaching.

Key questions

Activity theory can help resource a number of questions about the grievance process as a learning activity system. For example:

Learning outcomes. What do union members, stewards and the union as a whole learn in the process of a grievance? (Taking a wide view of where this process “starts” and “ends”). For consciously or not, through their direct or indirect participation, a worker engaged in the grievance process will likely learn some things about herself, her employer, her union, her co-workers, individual and collective action, public speaking, note-taking, the law, shopfloor politics, the broader system of capitalism, the inner workings of unions, and so on.

Learning processes. How, in the course of their activity, do shop stewards learn to represent their members, and how is this learning mediated by key *artefacts* / tools / symbols they access? What affords / constrains their use of these tools? How is learning mediated by the division of labour in the grievance system? How is learning mediated by formal and informal rules and conventions?

Dynamics and dialectics within (and beyond) the activity system. How are particular tools, rules, conventions and divisions of labour reproduced, or produced anew in activity? How are social locations and ‘difference’ (re)produced in activity (for example, how might a particular division of labour or use of particular *artefacts* serve to racialize members?) In what ways might learning in a grievance activity system be transformative at the individual and collective levels? At the level of class relations? And where it is not transformative, what can we learn by looking at the learning afforded or constrained by various aspects at play in any particular grievance activity system?

To borrow from Kilgore (1999), the grievance process shapes individual components of collective learning (i.e. identity, consciousness, sense of agency, sense of worthiness, and sense of connectedness) and shapes group components of collective learning: collective identity, group consciousness, solidarity and organization. We are interested in *how* it does so, in multiple and varied ways and how knowing more about these aspects could inform routine practices and union education.

FOCUS: SUBJECT & OBJECT

To understand learning in the grievance process we need to approach it from various subject standpoints ~ activity systems are “multi-voiced.” Just as surgery looks different from the perspective of the doctor than from that of the patient, a grievance looks different from the perspective of the grievor than that of the steward. The learning is different. And yet, both share same overall *object*: workplace fairness.³

We can begin with the grievor as *subject*. The grievor encounters a contradiction between her *object* / *motive* in the *workplace activity system* (e.g., the need to care for and provide for her family) and the carrying out of the rules of that system (perhaps she is passed over for a promotion for which she held the requisite seniority). Based on collective agreement language regarding promotions and

seniority, she can enter into the *grievance activity system* which is designed to resolve the contradiction between the collective agreement (itself an outcome of the *collective bargaining activity system*) and the workplace activity system. The grievor's *object / motive* will be infused with her own personal history of the workplace, labour processes and work organization more broadly; and it will be connected, or nested in broader social structures and systems that are dialectically produced and reproduced in the workplace and within the grievance activity system. A grievance regarding promotions may, for example, include dimensions of gender and race.

A grievor's *object / motives* in entering a grievance activity system will likely include material dimensions (to be "made whole," financial compensation, reinstatement, re-classification, etc.) but it may also include emotional dimensions (to reclaim dignity, demonstrate anger, settle a score with a supervisor, seek vindication). When a worker comes up against an activity system that is (through a series of socialized conventions and assumed consensus) supposed to "work" and finds that it does not, it will likely evoke an emotional response (indignation, outrage, anger, frustration, betrayal, hurt, etc).

The most prosaic daily routines, seemingly neutral, can provoke violent emotional responses when interrupted. Unusual actions probably involve even more, and more complex, feelings. Not only are emotions part of our responses to events, but they also – in the form of deep affective attachments – shape the goals of our actions. There are positive emotions and negative ones, admirable and despicable ones, public and hidden ones. Without them, there might be no social action at all. (Jasper, 1998, p. 398)

However, the tendency in social movement theory (where it even deals with emotion), is to relegate emotion as secondary to cognition (instead of, for example, part and parcel thereof) (Jasper, 1998). A CHAT analysis of the grievance activity system provides fertile ground for inquiring into emotion vis-à-vis learning, and is especially worthwhile to understanding the interplay of the "moral, cognitive, and emotional package of attitudes" (Jasper, 1998, pp. 409-410)⁴ that are learned through activity. The degree to which the actual (vs. anticipated) outcome of a grievance meets both the grievor's emotional and material needs, is worth attending to in an analysis of learning. We can expect that a grievor's *object* will not overlap uniformly with the steward's or the union's more broadly, for many reasons, not the least of which is the emotion driving (and deriving from) activity. As we will see as we fill in the picture, the grievor's *object / motive* loses centrality through the grievance activity system.

From a steward's standpoint, *object / motive* may vary considerably. The shop steward's formal role in the grievance is to represent the membership, represent the union, and uphold / defend the collective agreement. She may variously understand her *object / motive* as asserting the union's power in the workplace (using the grievance process as a wedge), representing members, fixing problems, building membership capacity or membership confidence

in the union, maintaining her position as shop steward, and / or strategic preparation for upcoming negotiations. Her goals might include satisfying, appealing or engaging a union member, winning the grievance at hand, meeting the union's duty of fair representation / avoiding a "failure to represent" charge, dealing with a particularly aggressive or abusive supervisor, sending a message to workers / members / management, making a good impression (on union leaders, co-workers, management, etc), and so on.

Depending on her *object / motive*, she will use or adapt key *artefacts* or tools which will mediate both the activity and her learning. For example, how and whether she relies on documentation, case law, particular use of body language and tone, relationships with supervisors, informal rules / workplace conventions, the letter of the law, a particular *division of labour* (i.e., is the grievor allowed / encouraged to speak at a grievance meeting or told to be silent, or not invited at all). Is the formal grievance procedure the only tool she accesses to resolve the workers' issue, or is it part of a broader campaign, or even bypassed altogether in favour of some other informal action, for example a community-based strategy? Each of these variables mediates learning, activity and outcomes.

Personal biography, social location, and the dialectical relationship between any particular activity system and other activity systems which (re)produce patterns of social inequity in both the workplace and the union are important aspects to understanding how learning is both afforded and constrained, and in particular what *artefacts* or tools a subject employs. For example, it is not a stretch to understand how a newly elected female Black steward in a traditionally male, white workplace would engage in a grievance process in a different way, have differential access to key *artefacts*, and might have separate and different *object / motives* from her white, male predecessor — offering an example of the highly contingent and variable outcomes of learning in activity. All of these factors need to be considered, while at the same time attending to the particular, and not reducing a subject to her social location. Sawchuk cautions against casting categories for subjects in this way: "a CHAT analysis that only recognizes an occupational identity will always fall considerably short of surfacing the contradictions at work in an activity system" (Sawchuk, personal communication, March 8, 2011). Obviously an analysis that can attend to the particular *and* the systemic tells us much more about both, than one in which the general eclipses the specific.

Where *object / motives* are unaligned or clash within an activity system we find opportunities for expansive learning (Engeström, 2001). Whether, for example, a steward adapts / invents additional tools to "meet" other aspects of the grievor's experience that do not "fit" the formal grievance process, will in part mediate the grievor's learning (and the steward's, no doubt, particularly as s/he may learn through the process to expand her *object / motives* to include

guage, past practice, case law, impeccable or sloppy documentation, witness accounts, seniority lists, positive or negative relationships between steward and supervisors, aggressive, assertive, conciliatory body language and tone of the steward, potential for labour disruption, timing, steps in the grievance process, grievor's employment record, a united and / or educated and / or angry membership, and so on. The degree to which subjects use, adapt, or re-fashion these *artefacts* will be in tension / dialogue with other elements of the system, including, of course, *object/motive*.

The grievance activity system centres around both the construction and resolution of workplace grievances. It may be reduced to a filtering process, or a process of translation, taking the workers' story and turning it into a violation of a rule. Or, as one shop steward manual says, "separating a complaint from a grievance" (Canadian Autoworkers Union, 2009, sec. 3, para. 2). When the grievance system relies solely on the formal grievance process and a narrow legal definition of the grievance (collective agreement violation), everything else falls outside of the frame to the extent that the worker's grievance (in the vernacular sense) may all but disappear. Equally, the fullness of the grievor's story may be used to "push" the grievance process – and become a key artefact in the system. In the framing of the grievance meaning emerges, as "context-specific social process" (Steinberg, 1998, p. 852). Krinsky (2008) expanded:

a view of meaning that emphasizes its dynamic, organizational, and coalitional aspects highlights the distribution of cognitive processes within "cultural-historical activity systems" composed of actors, the *objects* of their actions, the tools or artifacts they use to mediate action toward their *objects*, and the rules and divisions of labor by which their communities operate. If this view is true, controlling the terms of debate requires far more than strategically finding the "right frame." Indeed, activists' own interpretations of what is going on and what is to be done become subject to the structuring influences of the dynamics of the activity system. Nevertheless, lest this seem too over-determined, it is important to emphasize that these dynamics are shaped by activists' own action and the actions of others. Here, cognition does not precede political action but rather exists in a dynamic, dialectical relation with it. (p. 10)

Analyzing patterns in artefact use (*vis-à-vis* grievance construction and resolution) using activity theory can provide important insight for strategic thinking, where there is an openness to think critically about routine practices.

Community & division of labour

Grievors, co-workers, family members, stewards, union presidents, local and national unions, in / out house lawyers, governments, arbitrators, invested community members, and so on could all be considered part of the grievance activity system community. Whether or not they play a key mediating role depends on other factors at play. For example, in the 1970s, '80s and '90s, the broader women's community (and a growing women's movement within

the labour movement) did play a key mediating role in the construction of grievances dealing with harassment – largely through consciousness-raising of both women workers, and to a more limited degree, of union officials, supervisors / managers, and through successfully lobbying to change human rights laws (rules, tools, activity systems in their own right).

The division of labour in the grievance activity system is traditionally hierarchical, on both union and management sides. As a grievance advances, with every step taken higher-ups get involved and the process becomes increasingly formalized, up to and including the involvement of an arbitrator. Asking the question “whose grievance is it anyway?” is instructive on the question of division of labour. From the point of view of the union (and labour law / rules), the union has carriage of the complaint. In other words, the grievance belongs to the union, not the worker whose experience triggers the system. The union determines whether to go forward with, or drop, a grievance. The degree to which the grievor participates in the process depends on any number of factors, including local traditions / conventions / rules (see below) about whether or not grievors attend and / or speak at grievance meetings, as well as an assessment by the steward / local union on whether the grievor’s presence / voice at grievance meetings is likely to assist the union in meeting its objective. This may mean that the grievor never gets “their day in court” which may actually be a key goal of the grievor. Or, the grievor may take an active role. However, in either scenario there will be powerful lessons about how the system works / treats workers.

Rules & conventions

As noted, the grievance process is rooted in a legal framework that includes labour laws, past practice, case law, and human rights law, and excludes collective workplace job action. Collective agreements outline timelines, processes, roles and responsibilities and protocol for filing grievances. For example, they may require, or allow for an informal verbal attempt at resolution, they may outline who must be in attendance at grievance meetings, when and how a grievance advances to a subsequent level / step, etc.. Both formal rules and informal conventions (from where grievance meetings are held, to accepted tone of exchanges, to agreements to pass along grievances pertaining to human rights/harassment to a parallel activity system, etc.) will vary to some extent from one agreement and workplace to another, and can change over the course of several sets of negotiations.

Recall that from the union (as collective) subject position, due process is part of the overall purpose. Thus there is an inherent dialectical relationship within the grievance activity system between rules and *object / motives* wherein the exercise of the rules may become paramount – even (and sometimes especially) in the case of a non-winnable grievance, or a grievance filed on behalf of a member who has clearly violated the agreement or employer policy, or broken

another “rule” of the system (for example, in the case of member-to-member harassment). Here, the union will defend the grievor’s right to due process, in part to strengthen the collective agreement, in part because “due process” exists in motion as a rule, a tool, and an *object* of the system. Suffice it to say that this dynamic is often lost on members and critics of the labour movement.

A further key mediating rule in the grievance activity system is the dictum to “obey now, grieve later,” which fundamentally shifts the activity system temporally to a post-event response to workplace problems, rather than a key interventionist tool (e.g., a walk-out or “wildcat”). The mediating effect of this rule on both the workplace activity system and on the grievance system (and on the learning and outcomes they engender) should not be underestimated. This rule is designed to minimize workplace disruption, hold back or channel workers’ real frustrations and outrage.

Outcomes, conflict and learning in the grievance activity system

What comes out of social movement action is neither predetermined nor completely self-willed; its meaning is derived from the context in which it is carried out and the understanding that actors bring to and/or derive from it. (Hall & Turay, 2006, p. 7)

There are, of course, many ways to understand outcomes of social movement action. Material outcomes, like compensation, provide one angle for analyzing grievances, as do changes (or lack of changes) to systems, rules, and practices. A grievance may result in a settlement, it may lead to future union demands, it may increase membership meeting attendance, and / or it may divide workers, or bring them together. Outcomes will be experienced differently by different subjects in the activity system, based in part on their *object / motive*, and in part on how wide or narrow the gap between expected and actual outcomes. Take any one grievance and the union may interpret a win, management may interpret a win, the grievor may interpret a loss, and co-workers may interpret either a win or loss as well.

On the one hand, the grievance process is bureaucratic, heavily mediated by rules and division of labour with limited available tools. And yet it is the primary place where workers bring their experiences of injustice, seeking and expecting resolution / compensation. The idea of expansive learning calls forth an additional series of pedagogical and strategic questions for activists and educators:

- In what ways does a grievance activity system smooth over contradictions (seed for expansive learning) or create / expose them?
- In what ways does a grievance activity system mediate the grievor’s *object*, outcomes, and learning? In what ways does it afford transformative learning? What mediates learning such that a grievance activity system radicalizes or moderates members, stewards, co-workers, and / or the union?

- How does the grievance activity system attend to (and produce) the emotionally-charged nature of grievances, and how do emotions mediate activity and learning outcomes? Why might thinking about this be strategically important to activists, educators?

Expansive learning describes the cycle whereby contradictions arise and are resolved through the use of existing, new, or adapted tools. The grievance activity system mediates primary, secondary and tertiary contradictions of the workplace activity system – fertile ground for expansive learning. And yet, collective agreements are negotiated to provide some balance to the employer’s power in the workplace, thus mitigating primary contradictions between labour and capital – hence transposing contradictions to the operational level (where the way things are “supposed to work” is read as “according to the collective agreement”). The grievance system then becomes the operational “fix”: grievances surface contradictions in the workplace activity system, and grievance handling handles them. The grievance is nested in the collective bargaining activity system which, as noted above, is historically steeped in compromise. And yet this is often forgotten. So the “injustice” of a grievance may be felt only insofar as a rule of the agreement was broken, and the fact that the rule itself was weak or even egregious may remain unproblematized, and in fact legitimated by the grievance system (i.e., if we lose sight of the broader activity system of negotiations, it becomes difficult, or even obsolete, to parley a win into a new demand, let alone push against class structures). It could be argued that the grievance activity system limits or dampens the possibility for a more expansive learning or transformative learning that might otherwise occur in the absence of the grievance system as mediating tool for resolving workplace disputes. Or, rather, learning which might occur in the presence of more militant tools, such as sit-downs, or walk-outs. Of course the flipside is to let all hell break loose, but sometimes this might make sense strategically; that is, don’t use a tool that will mediate conflict if conflict is critical to expansive learning / transformation. Or at least use another tool.

Forms of political consciousness... emerge from uniquely human labour processes: the processes through which human beings make themselves vis-à-vis a process of “expansive learning” defined by the progressive resolution of activity system contradictions. (Sawchuk, 2006, p. 294)

One could be inclined to conclude that the “available *artefacts*” to workers and their unions are “tools of the weak” (Alinsky, 1971). But take away these tools and this activity system, and put the grievance and collective bargaining systems of the unionized workplace up against the tools available in a non-union shop, and all of a sudden both processes come alive as a potentially transformative, radical (and radicalizing) activities. The trick, as most labour activists know intuitively, is for stewards, activists, and educators to intervene critically in these activity systems such that they are used as a tool for under-scoring (and not obfuscating) primary contradictions of capital (or reducing

them to operational contradictions), all the while effectively using them to make gains for workers.

NEXT STEPS: FORMAL INTERVENTIONS INTO EVERYDAY LEARNING

As people live and work they continually learn. Most of this learning is unplanned, and it is often tacit; but it is very powerful. (Foley, 2001, p. 72)

As educators, an activity theory approach calls on us to better understand and make better use of informal learning. Going forward, we might consider the following:

- 1) *Teach activity theory to activists.* Develop curriculum that offers activists tools to: inquire into their own learning processes and practices; critically reflect on workplace / union activity systems as nested within the broader capitalist economy; deeply consider what and how members are learning through their interactions within the workplace and with the union; and reformulate their own role as actors in a learning system. Providing conceptual tools for reflection is a critical role for the union educator. As Foley (2001) wrote, practitioners need “a method which helps [them] investigate and act on what people are actually learning and teaching each other in different sites” (p. 71).
- 2) *Intervene in informal learning; extend the reach of union education beyond the classroom.* Ask: what are the support mechanisms in place for members engaged in a particular activity system? We know, for example, that grievances are a tremendous opportunity for unions to connect with their members, but they can also leave members disappointed, frustrated, disengaged, and angry at the union. What resources might be useful for grievors that could support / intervene in their informal learning? For example, does the union webpage offer accessible question and answer pages for workers dealing with a workplace problem that provide historical context as well as specific advice and information about the process, outcomes, etc.? Is there an on-line module or forum for workers to navigate to learn more about the grievance process – something that offers both detail and broad context for how and why the system works the way it does, and what variables shape and effect outcomes? Is there a mentorship program / guide in place to support the informal apprenticeship that makes up the bulk of steward “training”? It is a mistake to direct union education about grievances to stewards alone, and to limit our format to formal classroom programs. In defending face-to-face popular adult education programs, we have left many of our members adrift in that sea of learning.
- 3) *Conduct formal empirical studies of informal learning in routine union activities.* This article did not present an empirical study of the grievance process, but rather argued for a multiplicity of informal community-based studies. However, formal CHAT-informed research projects that investigate everyday collective

learning in routine union practices will contribute toward “a new standard for understanding human agency... that is mediated as well as historicized and materialist which admits agency as both individual and collective social action” (Sawchuk, 2006, p. 292). Empirical research on the grievance activity system (as a precise site of differential power) will be of interest to social movement theorists, adult educators, and labour researchers, in part because it will help explain how social movement structures shape development and participation, and in part because it will resource questions pertaining to the (re)production of power, agency, and hegemony.

4) *Re-think formal union education program design.* Deepen the exercise of “starting with people’s experiences” (see the *spiral model of education*, Burke, Geronimo, Martin, Thomas & Wall, 2008) to begin not just with what people know, but with critical inquiry into how we learn what we know. So, for example, in a health and safety course where one might traditionally ask participants to name key workplace hazards, we might additionally ask, how have you learned to “work safely,” and how have you, and others, learned to “work around” safety rules? Acknowledging all of this as learning, and interrogating why and how it occurs within the workplace activity system, can help activists and educators better understand what is at play that mediates both safe and unsafe outcomes, and where intervention would be most effective.

Really taking seriously the deep learning that goes on through the everyday practices of a local union (not to mention the broader labour movement) offers important opportunities to deepen the activist / popular education model of union education most widely used today by labour educators. It is not enough to take more seriously *what* people learn about unions at an informal level, but also *how* they learn, for this tells us much more about useful interventions and has us examine routine practices more critically through a strategic and learning lens. It leads us to take members’ informal learning seriously as a key concern in the development of strategy and an important piece of member mobilization. Teaching theory and processes for understanding informal learning could mean that the question “what are we learning here?” becomes part of the overall purpose, *object / motives*, of union activity systems, and directs new thinking about everyday union activity. Situated learning theories, and activity theory in particular, provide new critical thinking and pedagogical tools that integrate action and reflection, offer challenges for re-thinking strategic practice. At the same time, this approach “place[s] special emphasis on the self-definition of the learning process by the learner” (Livingstone, 1999, p. 68). It is very much in keeping with a popular education pedagogy (Freire, 1998) committed to democratizing theory.

Theory is that which helps you comprehend what is happening around you and within you. Theory emerges from the concrete, from efforts to make sense of everyday experiences, from efforts to intervene critically in my life and the lives of others. (hooks, 1994, p. 70)

Union renewal requires a massive undertaking on many levels. Gasparin and Fletcher (2009) have called on union leaders to rethink and resist their narrow focus on the trade union movement, and re-invest in the needs, aspirations and strategies of a more broadly-configured working class labour movement. But while on the one hand, as they suggest, we need to think beyond organized labour, union renewal also requires a process of deeply inquiring into our current everyday practices. By viewing the everyday practices of unions through the lens of learning we can both make visible and more meaningfully intervene in the everyday individual and collective learning of unions, activists, and workers.

NOTES

1. With the notable exception of Worthen, 2008.
2. This is particularly significant, if we accept Piven and Cloward's claim that "the most powerful tool of the oppressed is their ability to disrupt things. Bureaucratization usually interferes with this, as bureaucrats begin to develop an interest in maintaining their organizations" (in Goodwin & Jasper, 2003, p. 167).
3. It is for this reason that "management" is not considered a subject standpoint in the union grievance activity system outlined here. The grievance process is the basis of two intersecting workplace activity systems: one defined by management *object / motives*, and one by union *object / motives* (reflecting the inherent class conflict). As Engeström (2001) pointed out in third generation activity theory, multiple activity systems must be considered the base unit of analysis; we cannot explore learning (of the grievor, the steward, the union as a whole) without an understanding of the interplay between, at a minimum, the union and management systems. Arguably one might determine that given the compromised nature of the grievance system (as previously discussed), the grievance process can be understood as a single activity system (of course still nested, etc.). This would make for an interesting discussion wherever activity theory is used as a pedagogical tool.
4. A CHAT analysis might recast this as dialectic, historic, and activity-based processes.

REFERENCES:

- Alinsky, S. (1971). *Rules for radicals: A pragmatic primer for realistic radicals*. New York, NY: Random House.
- Bennett, E. (2012). A four-part model of informal learning: Extending Schugurensky's conceptual model. *Proceedings of the 53rd Annual Adult Education Research Conference*, (pp. 24-31). Retrieved from <http://www.adulterc.org/Proceedings/2012/papers/bennett.pdf>
- Bostrom, M. (2004). Cognitive practices and collective identities within a heterogeneous social movement: The Swedish environmental movement. *Social Movement Studies*, 3(1), 73-88.
- Burke, B., Geronimo, J., Martin, D., Thomas, B., & Wall, C. (2008). *Education for changing unions*. Toronto, ON: Between the Lines Press.
- Canadian Autoworkers Union. (2009). *Grievance handling and workplace leadership Instructor manual*. Unpublished manuscript, Education Department, Canadian Autoworkers Union, Toronto, ON.
- Carter, S. (2012). Mediating learning: An activity theory view of the workplace harassment industry. *Proceedings of the Canadian Association of Studies in Adult Education 2012 (CASAE)* (pp. 69-75). Retrieved from http://www.casae-aceea.ca/sites/casae/files/2012_CASAE_Proceedings.pdf
- Cooper, L. (2005). *Towards a theory of pedagogy, learning and knowledge in an "everyday" context: A case study of a South African trade union*. (Unpublished doctoral dissertation). University of Cape Town, Cape Town, SA.

- Coverdale, A. (2009, January). *Activity theory*. Retrieved from <https://sites.google.com/site/andycoverdale/texts/activity-theory>
- Engeström, Y. (2001). Expansive learning at work: Towards an activity theoretical reconceptualization. *Journal of Education and Work, 14*(1), 133-156.
- Engeström, Y., & Sannino, A. (2010) Studies of expansive learning: Foundations, findings and future challenges. *Educational Research Review, 5*, 1-24.
- Fenwick, T., Edwards, R., & Sawchuk, P. (2011). Contradiction and expansion: Understanding cultural historical activity theory. In T. Fenwick, R. Edwards, R., & P. Sawchuk (Eds). *Emerging approaches to educational research: Tracing the socio-material*. (pp. 56-73). London: Routledge.
- Fletcher, B. J., & Gapasin, F. (2009). *Solidarity divided: The crisis in organized labor and a new path toward social justice*. San Francisco, CA: University of California Press.
- Foley, G. (2001). Radical adult education and learning. *International Journal of Lifelong Education, 20*(1/2), 71-88.
- Freire, P. (1998). *Pedagogy of freedom: Ethics, democracy, and civic courage*. Lanham, MD: Rowman and Littlefield.
- Fudge, J., & Tucker, E. (2009, December). *The freedom to strike in Canada: A brief legal history*. Paper presented at the Right to Strike Workshop, University of Toronto, Toronto, ON.
- Goodwin, J., & Jasper, J. (2003) (Eds.). *The social movements reader: Cases and concepts*. Malden, MA: Blackwell.
- Hall, B., & Turay, T. (2006). *State of the field report: Social movement learning*. Victoria, BC: University of Victoria.
- hooks, bell. (1994). *Teaching to transgress: Education as the practice of freedom*. New York, NY: Routledge.
- Jasper, J. M. (1998). The emotions of protest: Affective and reactive emotions in and around social movements. *Sociological Forum, 13*(3), 397-424.
- Kilgore, D.W. (1999). Understanding learning in social movements: A theory of collective learning. *International Journal of Lifelong Education, 18*(3), 191-202.
- Krinsky, J. (2007). *Free labor, workfare and the contested language of neoliberalism*. Chicago, IL: University of Chicago Press.
- Krinsky, J. (2008). Changing minds: Cognitive systems and strategic change in contention over workfare in New York City. *Social Movement Studies, 7*(1), 1 - 29.
- Lave, J. (1996). Teaching, as learning in practice. *Mind, Culture, and Activity, 3*(3), 149-164.
- Leont'ev, A. N. (1978). *Activity, consciousness, and personality*. Hillsdale, NJ: Prentice-Hall.
- Livingstone, D. W. (1999). Exploring the icebergs of adult learning: Findings of the first Canadian survey of informal learning. *Canadian Journal for the Study of Adult Education, 13*(2), 49-72.
- McCarthy, J. D., & Zald, M. N. (2003). Social movement organizations. In J. Goodwin & J. Jasper (Eds.), *The social movements reader: Cases and concepts* (pp. 169 - 201). Malden, MA: Blackwell.
- Sawchuk, P. H. (2001). Trade union-based workplace learning: A case study in workplace reorganization and worker knowledge production. *Journal of Workplace Learning, 13*(7-8), 344-351.
- Sawchuk, P. H. (2006). Activity & power: Everyday life and development of working-class groups. In P. Sawchuk, N. Duarte & M. Elhammoumi (Eds.), *Critical perspectives on activity: Explorations across education, work and everyday life* (pp. 292-320). New York, NY: Cambridge University Press.
- Sawchuk, P. H. (2011, March). *Work and learning, graduate seminar*. Ontario Institute for Studies in Education, University of Toronto, Toronto, ON.
- Sawchuk, P. H. & Stetsenko, A. (2008). Sociological understandings of conduct for a non-canonical activity theory: Exploring intersections and complementarities. *Mind, Culture, and Activity, 15*(4), 339-360.

- Steinberg, M. W. (1998). Tilting the frame: Considerations on collective action framing from a discursive turn. *Theory and Society*, 27, 845 - 872.
- Stetsenko, A. (2008). From relational ontology to transformative activist stance on development and learning: Expanding Vygotsky's (CHAT) project. *Cultural Studies of Science Education*, 3(2), 471-491.
- Thomas, A. (1991). *Beyond Education: A new perspective on society's management of learning*. San Francisco, CA: Jossey-Bass.
- Vygotsky, L. S. (1962). *Thought and language* (A. Kozulin, editor & translator). Cambridge, MA: M.I.T. Press.
- Vygotsky, L. (1986). *Mind in society: The development of higher psychological processes* (M. Cole, V. John-Steiner, S. Scribner & E. Souberman, editors). Cambridge, MA: Harvard University Press.
- Wills, E. (2012). Teaching about labor through union worker–university student dialogues. *Labour Studies Journal*, 37(1) 81–103.
- Worthen, H. (1999). *Studying the workplace: Considering the usefulness of activity theory*. Unpublished manuscript, University of Illinois, Champaign, IL.
- Worthen, H. (2008). Using activity theory to understand how people learn to negotiate the conditions of work. *Mind, Culture, and Activity*, 15, 322-338.
- Worthen, H. (2012, March). *Learning theory for design, planning, implementation*. Paper presented at the United Association of Labor Educators Conference, Pittsburgh, PA.

SUE CARTER is a labour educator on staff with Unifor. She is currently pursuing her PhD at OISE, University of Toronto in the Sociology of Equity Studies in Education and is actively involved in the Centre for Studies in Education and Work. Her research focuses on identity, gender and emotion in informal workplace learning and social movement learning.

SUE CARTER travaille comme formatrice syndicale pour Unifor. Elle complète actuellement son doctorat en sociologie et études de l'équité en éducation à l'Institut d'études pédagogiques de l'Ontario de l'Université de Toronto et s'implique activement au sein du Centre for Studies in Education and Work. Ses intérêts de recherche portent sur l'identité, les hommes et les femmes ainsi que les émotions présentes dans les apprentissages informels réalisés en milieu de travail. Elle s'intéresse également à l'apprentissage qui a lieu en contexte de mouvements sociaux.