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ABSTRACT

This booklet is intended to assist union representatives at plants in counseling workers who want to pursue college studies. Presented first is a hypothetical case study of a 37-year-old printer who would like to attend college at night but who is beset with time, family, and money problems. The remainder of the booklet consists of guidelines and strategies for union representatives to use in helping their co-workers to address similar educational barriers, specifically: inadequate information about educational opportunites and negotiated education benefits, lack of time to pursue an education, insufficient funds for tuition and supplies, internal family conflicts resulting from the time and financial constraints imposed by the worker's continuing education plans, pressures from stereotyping by friends and family, and the need for an objective resource person to serve in an advisory or supportive capacity. (MN)

Please note that this working paper is being field tested by 'educational advisors.' We are also requesting comments from anyone else receiving this paper. At the end of the year, after all critical comments have been received, the paper will be revised.

We would appreciate your help in this endeavor and ask that you fill out the enclosed evaluation sheet. Feel free to write additional comments.

Thank you in advance for your cooperation.

LEAS

OVERCOMING BARRIERS TO WORKERS' EDUCATION

This is one of a series of topical issue papers commissioned by the Labor Education Advisory Services program. Dennis P. Schaefer, author of this paper, is a freelance writer, who has been a faculty member and assistant to the president of the Universidad Boricua in Washington, DC.

The pursuit of higher education for the adult worker is difficult. To tell the worker otherwise is to mislead him. Under the most favorable of circumstances, education -- like a job -- requires a lot or hard work. But as is also true with a job, the obstacles that prevent a worker from first finding educational opportunities, and then simply using them are usually much more difficult than the education itself.

The following obstacles are the ones that workers confront most often, and the ones that you have to thoroughly equip yourself to understand, to feel as the worker does, and to help him to confront. As you read the material, try to visualize the worker who confronts these obstacles and to imagine how the size of the obstacles will vary from worker to worker. To help you visualize the range, picture the following case, a difficult, but a typical one that you may frequently observe.

CASE STUDY

Jack Lapinsky, a printer, 37, is married and has two children, a ten year old son and a one year old daughter. Jack's wife, Becky, works three nights a week as a sales-

TIME

person at a local department store. She would like to work more, but can't because of Jack's semi-invalid father, who lives with them, and because of their baby daughter. Jack and his wife could hire a housekeeper to allow Becky to work full-time, but the cost and the higher taxes would eat up most of her earnings, and would strip away too much

FAMILY

of their family life. For a few weeks at Christmas time each year, Jack takes a part-time job in the post office or a department store to earn extra money. The Lapinskys total income is $19,500. They would like to move to a bigger house, one with a spare room or den, but can't afford the higher rent. The family's total yearly savings,

MONEY

after all bills, is only about $200, but special expenses usually pop up to take even that.

Jack earned a GED while in the Army, and later earned 18 college credits while studying at a local community college under the GI Bill. He would like to further his education because he believes that a college diploma -- an Associates Certificate or a Bachelors Degree -- would

INFORMATION help him to get a better job or higher pay. He also wants it for a reason he finds difficult to express for the sense of achievement. His parents, who came to this country in the twenties, had had almost no education, and most of Jack's brothers and sisters never finished high school. He doesn't know what to study, though, because none of the degree programs he remembers from college seem relevant to his livelihood. For this reason he rarely discusses the subject with his two best friends -- with whom he gets together one evening a week -- who never attended college and like to say that

STEREOTYPING "a college degree doesn't mean anything." In addition, Jack simply doesn't think about the issue much. The three nights

TIME a week, when he and his wife are both at home, he uses for

FAMILY watching TV, exercising, his son's soccer league, and doing

MONEY odd jobs. On weekends the only totally free time seems to pop up unpredictably and without warning, and to last only briefly. He knows that his union contract contains some education benefits, but there is a lot of red tape and he decided he will find out more about them when he actually

INFORMATION decides to go to school.

Apply the case study to the discussion below, and try to imagine how many and how strong these obstacles would be with the different workers you personally know.

1. Information

Many workers lack the most basic level of information on educational opportunities -- how to formulate their educational goals and needs. In the study above, Jack is not sure that education is relevant to his present and future job, and is totally unaware that there are different types of career and educational counselling services that could help him to identify his specific needs. Most colleges offer counselling services or standardized career tests -- though these are usually offered during working hours, and for a stiff fee.

Even if Jack Lapinsky knew specifically what he wanted to study -- say, mini-computer technology, graphics, and business administration-- there is yet another vital type of information that he lacks, and that he is not well equipped to gather, such as college catalogs, course descriptions, and schedules of classes. To further compound the problem, many colleges no longer

mail offerings and schedules of classes with little advance notice. To be able to chose the optimum school and classes, Jack would have to get all the catalogs, make a list of all the application deadlines, list the desired courses, and the likely hours, note the registration dates and times, and then contact the various departments to discuss the course content.

Once Jack selects a class, he faces another problem -- registration. While some colleges offer advance or mail registration, many continue to use outdated methods that require hours of needless waiting and walking. Among those who offer evening registration, most refuse to allocate space for evening registrants, who often arrive to find that their course was filled up much earlier in the day. This can be devastating to a worker like Jack, who has carefully selected, say, two courses at just the right times, and finds that only one is available. More than a few working students have cancelled the entire term's program on the spot, and many have selected irrelevant but available courses that later served to demoralized the student.

Many workers are simply unaware of negotiated education benefits contained in their contracts, or, like Jack Lapinsky, only vaguely aware of them. This occurs because at the time of contract negotiation, issues such as wages and hours dominate attention. It is also due to the fact that education benefits often entail cost-reimbursement plans, course approval provisions, or other provisions requiring the worker to initiate a complicated set of unexplained procedures. Other workers may face the problem of company-sponsored education benefits with similar complications. For both types of workers there is an additional problem: companies are often reluctant to advertise education benefits or may actively discourage the employee from making use of them. This occurs for several reasons -- only one of which is that limited funds may encourage a company to reserve such benefits for favored employees. Nothing is more demoralizing to a worker like Jack Lapinsky than being told

that funds are used up, when he suspects that this is not true.

You should do three things to provide the workers in your plant or your local with the information they need. First, you need to raise your co-workers' consciousness about the education benefits and educational programs available. Second, you should gather the information about programs, classes and benefits. Third, you need to help create a host of new options and resources that will help to encourage your co-workers to pursue higher education.

The first step in raising workers' consciousness is to get a copy of your bargaining agreement and familiarize yourself thoroughly with its contents. For further information, see your shop steward or other local officers to find out whether any additional educational benefit proposals have been promoted in the past. Find out the details of their content and the reasons they were rejected.

You might want to develop an introductory questionnaire to poll the workers in your plant as to the present state of their interest in education. For example, you could ask about the types of classes they are interested in, what times of day and what days of the week are most convenient, and where they would prefer to go to school (on campus, at the union hall, company property, etc...). You could hand out this questionnaire at a union meeting and arrange for the speaker to request that completed forms be turned in as the members leave.

When the forms are returned it is very easy to make a tally of the courses, sites, times desired, and the numbers of people who want further information. This will begin to define your task as to the information you need to gather from local schools.

Your next step is to try to raise the consciousness of some people from your local colleges and universities and to find a liaison between the school

and your co-workers. At first, you may think that you have nothing to offer an educational institution -- that they, rather, are offering you a service on their own terms. This is untrue. Keep in mind that educational institutions are suffering a shortage of students -- and students are money. If you can deliver twenty-five students, each taking two courses at $100 per credit, you are offering the institution at least $15,000. Furthermore, this $15,000 goes toward reimbursements of costs the institution has already paid -- not additional costs -- so your students represent the equivalent of a generous grant or endowment.

Therefore, when you approach a university, you have considerable leverage in requesting that they:

- fix a class time convenient to your co-workers
- offer classes at convenient locations
- offer advising, counselling, testing, or registration services or other staff assistance according to your co-workers' needs

An ideal way to start is to send a letter to the Dean of Admissions, stating that you have, say 20-30 students interested in three or four courses (name the courses). Explain that it will be necessary to arrange for special recruiting, counselling, and other assistance.

When you go to meet the Dean, take with you your tallies of preferred times of classes. In addition, you should prepare a list of the types of information you need to get from him or her. Some examples are:

- several copies of the college catalog
- this or next term's schedule of classes
- the name of a recruiter or instructor to come to speak to each group of workers regarding a specific class, and entrance requirements
- the name of an admissions officer who would be available to come to a union meeting or a special meeting to explain admission and registration processes
- the name of a recruiter who could speak to workers (perhaps at a union meeting) to create an outreach to workers

- the name of an accounting officer with whom special financial arrangements could be made (such as deferred payments of tuition to allow for company payment)

- the names of the heads of the various departments offering classes your co-workers have expressed an interest in

With your catalogs, create a resource library that you and the other workers can use. Ideally you should have one set of catalogs with you at work and others in places where you can retrieve them easily.

To make sure that your co-workers, particularly those who expressed interest when you began your consciousness raising work, receive your information, you should take some steps to actively follow up. A good way to do this might be to post a list of the times and dates and institutions where the most desired classes are offered, and to request workers to sign up. Keep in mind that this is only one suggestion for getting your co-workers involved. You know your own work situation best, and should use your own judgement to select methods for recruitment.

In doing this type of follow-up you are going to begin to elicit your co-workers' reasons for not enrolling (e.g., class time or location are wrong, costs are too high). This is valuable information. Take the time to find out all the reasons and to reach a careful conclusion as to the real problems with the schedule you offered.

Once you have had a college representative speak to your co-worker, you can begin to discuss your special logistical problems, such as:

- Application Forms - Will someone be available to assist workers? Can fees be waived? Can deadlines be waived?

- Prerequisites - Are any of your potential enrollees unable to enter classes for which you believe they are qualified? Will a waiver be possible?

- Class Work - Can the college offer your co-workers any special credits for on the job experience or critical life experiences related to their studies? Are internships involving their jobs possible to meet degree requirements?

- Counselling - (Academic) Will the college designate a selected counselor

responsible to workers needs? Can the counselor come to the plant or union hall for free contact with the workers? (Financial) Can the accounting office provide a student financial aid person for your enrollees? Can VA counselling be rendered more conveniently?

Use your creativity and ingenuity in thinking up new ideas tailored specifically to your enrollees' needs. Included in these options might be ways for the college to assist you in addressing the other special needs discussed below.

2. Time

There is not a single adult worker in the world who has the time to go to school, for the simple reason that, time like money, is being spent when it is not being saved. The first problem with worker time problems is in persuading the worker to accept the burden of budgeting and reallocating his time. Fortunately, this can usually be done by simply telling the worker to imagine that his job is going to require that he work three extra hours, two nights a week.

Even for Jack Lapinsky, it would be easy to accommodate this do-or-die requirement. But several problems would have to be addressed. And when the proposed two nights per week is merely an idea (where the worker doesn't even know which nights, or what hours) the worker faces a complicated issue. These problems involve systematic decision-making by the worker; the kind he isn't going to want to do after a day of work:

- Is Jack's wife capable of shifting the days of her work? This would would allow her to be home when Jack is at class.
- Is Jack's father capable of minding the children for part or all of Jack's class time?
- Do Jack's education benefits allow him to go to school on company time?
- Will Jack be able to study the three nights a week when he is minding the children? For how long?
- What study time will be available on the weekends?
- Assuming that Jack and Becky can arrange their evenings properly, what

will the added cost in work or time be to Becky? How much less time will Jack be spending with the children? What joint activities with Becky and the children will be affected (e.g., PTA meetings, school events, recreational activities). These should be listed. Usually, the losses can be minimized by careful planning.

- What costs in time with friends will be encountered?

The above example (two nights a week for three hours) is relatively uncomplicated. In fact, most workers who decide to go back to school are going to want to take two classes at a minimum. And it is highly unlikely that the adult worker is going to find his two or three classes offered back-to-back on the same nights. What is more likely is that the worker has to face four nights per week of classes.

The second problem is in the timing of classes. Most schools offer at most one class before normal working hours, and only two or three after working hours. If the campus isn't close to the job-site, two trips per day may not be feasible.

The third problem is timing of activities geared to the real situation. Jack Lapinsky would usually only learn the timing of his desired classes shortly before they became available. He would have to apply and register in time to meet the deadline.

As we saw in the fairly typical case of Jack Lapinsky, even when a co-worker's time appears solidly booked up there are ways to help him or her rearrange or rethink the present schedule to accommodate one or two classes. Don't forget, however that you are trying to accomplish two, somewhat opposite objectives here. On the one hand, you are trying to get the worker to make an extra effort. On the other hand, you want to identify time problems that you ought to be able to remedy in your bargaining with the colleges.

A good way to make the worker prioritize his time and make the topic manageable is for you and the worker to block out the present schedule, and make a check mark in each time frame where the worker has apparently available

time for study.

In Jack's case, it would be easy enough to suggest that a class, even two, right after work, could easily be squeezed into his weekday schedule, on Tuesdays and Thursdays. What if the classes Jack wants aren't available on Tuesdays and Thursdays? Highly unlikely, if you have information from several colleges and universities. If this does occur, though, it is easy enough for you to see what nights your other workers need the class. You will even know who can change, who can't. Still, if all fails with your workers, you have another option -- your college. Suggest a new time or a new section to meet your workers needs.

The better you keep all the facts about your enrollees interests and availability organized the better a bargainer you can be. Remember that you are trying to meet the needs of the greatest number of workers. And the size of your group is what gives you your bargaining power.

3. Money

College is expensive, and even reimbursed costs may require considerable cash outlays by the worker, or expenditures for non-reimbursed expenses such as books and supplies. This one cost alone may be the difference between a smoothly running budget and a period of financial anxiety.

Colleges are notoriously inflexible about payments. Most schools allow at best a two installment deferred payment plan with the final payment due at mid-semester. For the worker awaiting a reimbursement upon completion of the course, the lost income may be one or two entire paychecks. Some colleges do offer company reimbursed enrollments to pay up to ninety days after course completion, but these provisions are often unknown to the worker, or may require an elaborate application process.

There is another financial barrier even when advance payments are made by

the union or the company. The forms the worker has to fill out are frequently not much different from a loan application, and may even be labelled "Financial Assistance." To a worker who has struggled to provide a good living for his family, the very form of the request may be humiliating.

There are several short-term remedies you can try for workers who lack funds:

- Tell your college contacts that you want a written notification that a certain amount of their federal student financial aid funds be specifically earmarked for your enrollees
- Contact a bank to arrange a short-term group loan for immediate tuition payments at a reduced interest rate
- Tell the college flatly that they are jeopordizing all of your group's enrollment if they refuse to offer the credit deferrals to your few enrollees unable to meet the inordinate demand.

In addition, you can help the worker by lending assistance in financial planning. If your potential enrollees are few, you might want to do this directly, in personal meetings with the worker. If, on the other hand, you have many enrollees or feel you lack the resources, you might want to arrange a financing meeting for all potential enrollees, and have one or more speakers offer the advice.

Where do you find these speakers? There are several excellent sources at your disposal:

- a financial aid officer from the college
- a representative of your union's bank
- a representative from the company credit union or accounting office

In gathering these resources you should be careful to ensure that some of the special problems confronted by your workers will be addressed. For example, many separated or divorced female enrollees may have credit problems that need an expert's touch. A female financial counselor with a sound background in your state's credit laws may be just the person. In addition, many recent arrivals to the U.S., particularly the Spanish speaking, may lack a

credit history, business reference, or a co-signer. This will often be true in the case of Cubans, other exiles, or illegal aliens. If you feel you need a special resource person, ask for assistance from some local social service agencies geared toward the particular group. A few examples of such agencies are:

- o The Mexican-American Legal Defense and Education Fund
- o La Raza Unida
- o LULAC

In addition there several long-term alternatives:

- o try to get the college to agree to direct payment by the company
- o contact your union officials to see if the union's bank will offer guaranteed student loans to enrollees
- o at the next contract negotiations, propose that direct payments be written into the agreement and/or that the company pay directly into an education fund.

Clearly any of these alternatives requires that you develop a detailed, written proposal for the requested action, showing the need for the action, the problems the action will solve and the feasibility of the approach. In all of these alternatives, too, the principle remains the same; use the resources you do have to bargain with the resources you will have. The greater the number of enrollees, the greater the incentive for the college or company to accommodate their needs.

4. Family

It may be possible to arrange for a worker to get all the necessary information, finance his studies, and re-budget both his finances and his time. It may be harder to justify cut-backs in time with the family, or to handle the fact that one's spouse and children are now competing with each other, or with the worker's friends for the worker's time.

The fact is that the adult worker will have to face internal conflicts, and

possibly guilt, over the fact that he is letting down someone in his family. This can even result in domestic conflicts. At some point or other, the worker, like Jack Lapinsky, is even going to face the problem of competing with the family for his own free time.

Once you have helped an enrollee to budget his/her time, you can begin to help him/her mitigate the family effects of these cut-backs. The best way to do this is to integrate the family into the worker's studies -- to treat the parent's education as a cooperative family venture in which each member has both a role and a stake. This can be achieved through a host of small but important maneuvers:

- Urge the worker to hold a family meeting to explain the new schedule, the study hours, the classes to be taken, and the overall goal. Further, explain the need for the other family members' help in preparing a quiet study area, in making sure that the worker gets uninterrupted study time, and in setting down rules for "protecting" the worker from interruption.

- Hold a family affair at which education certificates or awards can be given out. Invite whole families and commend the families for their roles in the achievement.

- Urge workers to freely discuss the class selection process, course content, and study problems with all members of the family. Emphasize the danger with the attitude that a spouse, parent, or child can't understand a study problem. Encourage the enrollee to accept that verbalizing a problem -- to anyone -- often helps one to see the solution, and that the family member needs to feel that he or she has made a contribution.

- Advise the worker to attempt to study in new settings when home-study isn't possible. For example, a family reunion, camping trip, or pic-nic might indeed offer the worker a few moments for study.

As you deal with the enrollee over a period of time you will automatically begin to see and develop new ways of intergrating the family into the enrollee's program.

Women workers are likely to feel even greater pressure, and greater guilt, over the issue of family obligations. As the number of female-headed households continue to rise in the U.S., the number of women who need higher education but can't face the emotional task of pursuing it is rising. This group

requires extra counseling and support.

5. Stereotypes

Friends and family have a certain set of expectations as to how the worker should act and feel. When the worker steps out of that pattern he confronts the pressure of stereotyping. If a worker's feelings about the value of education are at odds with his friends', as in Jack's case, he may minimize the conflict by not bringing the subject up. The result can be very frustrating or agonizing for the worker. He may experience alienation from his friends, a sense of guilt or disloyalty, and may provoke fallings-out by trying to persuade his friends to share his point of view. Worse, he may be demoralized by their comments. It doesn't take much of this before someone like Jack is asking himself which one has to go -- school or friends.

The most pervasive source of stereotyping is one's own family, and one's own self. A worker whose parents never graduated from high school or whose siblings never attended college may face severe internal pressure to embrace his family by rejecting school and personal advancement.

Female workers face hightened pressures. Whereas a male worker may be able to justify a diminished paternal role by the knowledge that he is increasing his ability to provide for his family, his wife would not be allowed the same rationalization. She would have to face the fact that her unperformed duties could not be made up in the future, take the lukewarm comfort that she had found someone else to do her duties, and always wrestle with the question of whether she was trading her maternal role for money.

What if the worker (male or female) is of Hispanic or American Indian origin? Add a language and a racial barrier as well and you can see that the pressure of stereotyping may be devastating.

If you integrate the family into your co-worker's program you will find that many of the psychological pressures of stereotyping will be minimized.

There are many things you can do to further enhance the enrollee's sense of purposefulness. However, first the worker needs to be reminded that he is setting a good example for his children, creating the impetus for them to get a college degree. He needs reminding, too, that his earning power and standard of living will rise as a result of his efforts. These reminders can come in the form of a spoken message, personally, or at a group meeting, or as part of a recruiting letter or brochure. The simple message that every parent wants his child to have a better life is a powerful tool.

You can aleviate the peer pressure of friends by urging the enrollee to share brochures, certificates, and awards with them. Another important source of support is press coverage in local newspapers or the union newspaper. If you make sure that the names and accomplishments of enrollees are well publicized, you will be giving your workers both an ego booster and a handy tool for making friends and family note their accomplishments.

6. Advisors

Every obstacle we have discussed thus far has clearly been something that an advisor could help the worker to articulate, confront, and resolve. The worker needs a detached person -- someone who can be objective, someone who is not personally swayed by any of the pressures we've discussed, and someone who knows or possesses the resources to solve some of these problems. A supportive spouse, or parent, or friend is usually not the appropriate person. Also, college advisors are usually not equipped to handle the problems of adult workers.

You will often be the worker's sole resource in overcoming the obstacles discussed above. Everything depends upon how well you get to know your coworkers, and how effectively you can communicate what you know to them. This means not just talking to them, but motivating them, learning what kind of support they need, and following up after the worker has begun a course or a

program.

There are two very simple ways in which you can assure that you will offer your co-workers a high quality of resources and support. First, keep yourself updated through contact with your colleagues and mentors and second, provide a thorough and periodic follow-up with every enrollee or potential enrollee you identify.

In the first case, your union connections and college contacts will provide you with ample opportunities to discuss and share information and ideas regarding specific problems you encounter. Much of the time this can be both a stimulating and challenging social outlet in which you will find yourself deluged with new ideas.

In the second case, you will find that your own local problems and needs will make themselves known to you the more you follow-up on contacts. All of the above discussion has suggested typical problems that you will encounter. But the form of those problems will vary, and it will be up to you to let others know exactly the type of issue you are confronting. Chances are that someone else will have dealt with the same problem. And don't lose sight of the fact that you, too, will have helped to assure that the advancement of all workers, all people, will not succumb to the forces that oppose this struggle.

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