Worker responses to technological change in the Canadian public sector: issues of learning and labour process

Trish Hennessy and Peter H. Sawchuk

The authors

Trish Hennessy is a Master's Student and **Peter H. Sawchuk** is Assistant Professor, both at the Ontario Institute for Studies in Education, University of Toronto, Toronto, Canada.

Keywords

Organizational change, Public sector organizations, Deskilling, Trade unions, Learning processes, Canada

Abstract

This article reports selected findings from a study on the changing nature of work, learning and technology in the Canadian public sector (Ontario). *Vis-à-vis* the involvement of a major management consultant firm, these findings mirror the experiences at the nexus of policy, labour process and technology, seen in several other western countries. The authors examined workers' learning responses to management-led introduction of a leading edge, Web-based social service delivery system. The paper shows how neo-Taylorist principles have shaped work design, and argues that the result has been a high-tech form of "de-skilling" (Braverman) in which semi-professionalized case management workers' skill/knowledge sets have been systematically broken down. The process has been contested however. Workers have sought to learn and re-skill, generating not only specific computer-based skills (or "work-arounds") but more general, collective cultures of learning within the everyday life of work. This learning is sometimes in keeping with managerial interests, and sometimes not.

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Introduction

This article examines the complexity of public sector front line social service workers' (a.k.a. case managers') learning in response to management-led introductions of new information technology (IT) and workplace reorganization in Ontario, Canada. It reports on selected findings from the Working IT project: a study that explores multi-organizational factors affecting learning and work relations[1]. We outline how workers face new pressures in their daily work due to a combination of sweeping, neo-liberal welfare reforms. The nexus of policy, labour process and technology complicate and limit the kind of work and the kind of learning (organized, informal and tacit; individual and collective) that case managers perform. Our findings also underscore the critical role workers (the majority of whom are women) play in re-shaping technology to meet their own needs and those of their clients – the poor and disabled in Ontario. Public-private partnerships between the provincial government and a multi-national consultant firm, a leaner public sector, heightened technical control, and reduced welfare rolls form an interactive backdrop to workplace/IT change and workers' learning responses.

Some theoretical considerations

Our perspective is oriented by three assumptions. First, that it is not very helpful to understand the learning process as individualized. Interaction and cognition have a dialectical relationship with one another but this relationship is not symmetrical. Hence it is our view that a broad, socio-cultural as well as historical materialist perspective on the nature of learning is an appropriate means to understand the complexities and conflicts associated with learning and work. Second, one cannot understand mediating artifacts, especially complex ones such as advanced IT systems, strictly in terms of their design parameters and intended use. Users shape and alter IT systems in the course of practice. Third, it is essential to recognize distinct social and occupational (class and gender) standpoints in analyzing people's learning responses. In keeping with these assumptions, in our research we have drawn on several key sets of theoretical/empirical literature:

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- labour process theory (see Wardell *et al.*, 1999);
- feminist theory (e.g. Smith, 1987; Cockburn and Dilic, 1994; Webster, 1996); and
- socio-cultural theories of learning (e.g. Engestrom, 2001).

Specifically, a labour standpoint is chosen to give voice to workers in a climate of change that tends to privilege managerialist rather than working-class perspectives. The feminist standpoint is equally informative in this situation, though we are pressed for space to elaborate fully on this point, as most public sector workers delivering welfare and disability services in Ontario are women. Any study of the implementation of new IT within Ontario's social service delivery system needs to explicitly examine the underlying dynamics of the feminization of this type of work.

Context: government outsourcing and neo-liberalism

Literature shows that the public sector in countries like Canada has displayed several important differences in the way it organizes work (Lowe, 2000) when compared to the organization of work in the private sector. However, the feminization/de-skilling of public sector social service delivery in Ontario – reflective of a broader neo-liberal agenda within a globalized economy – has added complexity to these differences and brought the two sectors closer together. In 1995 the Ontario Government set a:

> . . . goal of creating efficient programs that would save taxpayers money and provide excellent customer service, information on demand, and modern technology (Ontario Government, 2002a).

This initiative included the reform of the social assistance delivery system through the implementation of a business transformation project (BTP). The BTP comprised of a public-private partnership between Accenture (formerly Andersen Consulting), municipalities (which administer welfare assistance), the provincial Ministry of Community and Social Services (which administers disability assistance), and front line delivery staff in welfare and disability offices. In December 2000, the BTP resulted in an automated eligibility review process for welfare and disability clients, an automated telephone system to provide information to clients about their cases (limiting client opportunities to deal with case managers directly), and a province wide database designed to help detect welfare fraud and allow recipients to transfer their entitlement if they move around Ontario. A new IT system, called service delivery model technology (SDMT), was implemented in more than 200 community sites across Ontario to create a province wide system that is centrally controlled – a first in Canada. The Ministry and Accenture claim the system frees over 7,000 staff to "spend more time serving recipients" (Ontario Government, 2002b), as well as reducing welfare fraud. Our findings challenge the veracity of these claims.

The significance of our findings, however, reach beyond Canada. The basic patterns of work, learning and IT change have been and will continue to be mirrored around the world wherever neo-liberal governments flourish. Importantly, Accenture now describes its partnership with Ontario as a success. A review of Accenture's on-line promotional material (www.accenture.com) outlines a corporation intent on working closely with neo-liberal governments to bring what are commonly referred to as private sector notions of efficiency, flexibility, and accountability to the public sector. Central to this – the grease that takes the squeak out of the wheel – is a worldwide strategy to laud government outsourcing as the ultimate business solution for the public sector. Of course, what is missing in these accounts is the perspective of workers. In Canada, workers and their unions – Canadian Union of Public Employees (CUPE), the Ontario Public Service Employees Union (OPSEU), and the National Public Union of Government Employees (NUPGE) – have criticized the process and the substance of the changes now facing workers (see OPSEU, 2000). CUPE (2000) released a study citing workplace stress due to downsizing, over-work, and lack of flexibility of work processes. Lewchuk (2002) documented similar concerns in his study of the impact workplace reorganization and SDMT had on OPSEU workers in the offices of the Ontario Disability Support Program. Lewchuk (2002, p. 1) concluded:

> Not only is workload excessive, but it is done in a context where staff have limited control over

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> how work is done, where support at work is inadequate, and where there is an imbalance between effort and rewards.

OPSEU workers picketed government offices in Hamilton, Brantford, St Catharines, and Simcoe in September 2001, saying Accenture's new automated system was deeply flawed:

> It's not working and needs to be fixed and we want the public to know (OPSEU representative Paul Statham).
>
> It means clients are phoning up and yelling at us for system errors that we have no control over (Polaris Institute, 2002).

NUPGE (2000) criticizes Accenture's strategy of achieving profits by helping governments cut social assistance caseloads and reduce public sector staff:

> Computers take over from human beings and those who get hurt are the most vulnerable people in our society.

As Whorley (2001) observes in his analysis of the Accenture deal, the Ontario government's embrace of private sector values was a clear reflection of managerialism, or new public management (NPM):

> The view is summarized by Donald Savoie as being "rooted in the conviction that private sector management is superior to public administration. The solution, therefore, is to transfer government activities to the private sector through privatization and contracting out".

In his analysis, Whorley traced the history of the "Accenture (Andersen)-Comsoc affair" and revealed the public-private partnership created a power imbalance that left the ministry vulnerable. Into the mix of critiques, our research findings suggest that the government has not only devalued the work and skill potential of workers within the public sector, but has initiated a strident attack on their skill and knowledge.

Findings

Front line service workers in the Ontario Works (OW) and Ontario Disability Support Program (ODSP) programs facilitate the delivery of social benefits to unemployed or disabled citizens in a variety of ways. They create a file for applicants, monitor changes to personal circumstances, and assist clients in job search or in accessing specialty support and training programs. The workers often, though not exclusively, have a university degree or college diploma related to social work. Significantly, the new work/IT changes have placed the new Web-based computer system, SDMT, at the centre of the labour process, while the once broad, semi-professional occupation of welfare and disability case management has been sub-divided into a neo-Taylorist, modular production system. A single client's file now goes through several workers' hands in a day. New learning has focused mainly around use of SDMT. Training on SDMT was provided by organized courses (approximately three days) and self-directed, computer-based learning (approximately 33 hours). Significantly, our findings indicate that workers consistently criticize the relevance of these organized forms of learning on their own, indicating that informal learning among peers (though not formally supported), as a foundation in the learning process, is most important. Moreover, our study explores activities across a range of workplaces and institutional domains including: (large, medium and small) municipal service delivery sites and IT support services work centralized in the provincial capital of Toronto. In total, we studied five OW and ODSP workplaces where we asked workers to tell us about their experiences learning (and sometimes "learning their way around") SDMT and associated labour process changes. Our semi-structured interviews ($n = 80$) will be supported and further verified, at a later date, by a province wide survey of case management workers.

As we have noted, the recent changes have wrought considerable consternation, stress and health problems upon front-line service workers. In this opening report on findings, we see that interviewees commonly report feelings of frustration and loss over the implementation of the new system. Virtually every interviewee notes that they work and learn under a labour process that has been transformed from a humanized, holistic and semi-professional one to one that is depersonalized, polarized in terms of labour/management relations, fragmented and de-skilled. The changes are enmeshed within a complex web of institutional relations through which informal learning amongst co-workers at the local level emerges as both the "last line of defense" for coping with SDMT-related technical glitches and

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increased workload as well as the foundation for a creative response by workers to re-skill and re-humanize their work.

Although the provincial government's agreement with Accenture was premised on the achievement of "improved customer service", service workers in our research consistently explain that the new system is far too rigid to respond to the unpredictability of client needs. Workers tell us the quality of the service they provide has deteriorated significantly due to less personal/professional contact. The professional relations and quality of service provision are further compromised by an IT system that is "slow", complicated, routinely "crashing", erroneously issuing letters to clients, and one which commonly turns simple errors into bureaucratic nightmares. A key issue is workers' inability to get adequate responses to their routine reports of system error. For example, simply tracking the source of an overpayment to a welfare client can lead to hours of problem-solving among co-workers, supervisors, SDMT specialists, and the central help desk. In many cases, the source of an erroneous overpayment cannot be traced, and answers to technical problems sit months without resolution (BDBTH03032)[2]. Frustrated workers trace these errors and computer glitches back to the lack of meaningful consultation with them in the initial design phase and believe the technology would better serve their purposes if it had been designed with an understanding of the work they actually perform. Plans for up to 15 per cent reduction in the service worker employment are underway as the system finishes its first year-and-a-half of full operation, yet workers submit their work load is greater than ever. Overall, we see that the case manager job is undergoing a form of radical "de-skilling" (Braverman, 1974; Wardell *et al.*, 1999).

Using the previous job characteristics as a starting point, we have found that prior to implementation of SDMT, case management was something that could be termed a "semi-professional occupation" in terms of skill/knowledge: that is, workers typically exercised a great deal of discretion and autonomy over service delivery and training. Beyond keeping up with legislative changes, their knowledge/skill areas included ongoing, on-the-job professional development through client home visits, "case meetings" with co-workers and genuine mentoring by supervisors. Now, however, routine home visits are eliminated and workers have become file administrators, "tied to the computer" (H1AT0303) as interviewees often noted. Another worker comments:

> We used to use our eyes and ears and judgment. Now we just type things into the computer (B2PS0303).

Another interviewee provides a sense of how work has undergone a form of neo-Taylorization, summing up the labour process this way[3]:

> *I*: So it sounds like the flexibility to use your own judgment and timing is gone?
>
> *S*: Totally gone. It's absolutely structured now, between 8:30 and 4:30.
>
> *I*: And it affects the way the clients see the process too?
>
> *S*: Definitely. The service is not as personal. I don't have a clue who the client is, who was in this morning. I know nothing more than they gave me their income, assets, and living arrangements.
>
> *I*: Just numbers on a screen?
>
> *S*: Yes. It's a shame because we learn more about the situation when it's personal, and you get to know the people more and you know which one's are fudging it or not, so the potential for more fraud is there now . . . It's not something that if I just started, I'd say, I'd like to do this for the next 30 years (B1PS030).

A service worker from another of our research sites concurs:

> [Before] it was done manually. It was very, very different because we did home visits so we went out and we saw the clients, where they live and stuff like that. We were out on the road, we had our own schedule, we could stop in and see them, especially for young mothers. To see people's circumstances made a big difference . . . The worst part was that it felt like we don't have much control . . . We had people waiting for their monthly payments so they could just pay their rent and their bills, so it was frustrating. What I don't like about SDMT is that when you're taking applications you're always typing now, whereas before you used to just sit and jot down an odd note but you could sit and talk with them directly (SC1DB0303).

The learning process

In response to these changes, we see several themes emerging. First, the expansion of spontaneous, informal co-worker learning networks. Beyond the organized training outlined above, occasional half-day seminars were delivered locally on a needs basis, and until recently there had been local

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"trouble-shooters" whose job it was to work informally with other staff. As the organized training resources have receded (with the expiry of the implementation phase), workers have come to rely on their own forms of individual and group informal learning (all unpaid):

> I can see a lot of the more informal like water cooler talking now, and you know it happens like if I had a case, for example, and I don't know how to do something I would ask somebody: Have you ever had this before? And they'd say: "Oh yes, this is what I did" . . . I've learned a lot more short cuts, so here I am doing it the long way all this time and then somebody just happens to see me and says, "What are you doing it that way for? Just press this button". I've had a lot of those (SC1DB0303).

Labour process and technological changes are closely linked to this learning response in a variety of ways. Workload, for example, is a major "learning" issue: as one (former) local "troubleshooter" commented:

> [W]orkers, because of the workload, simply don't have the time to figure out the origins of [for example] overpayments (H1AT0303).

Second, our findings indicate the need to improve the SDMT adjustment and re-design process. A re-design process that takes into account the advice, experience and end-use of front line workers is crucial to the success of SDMT. However, the re-design process is complex, taking place in multiple organizational spheres (over 200 local work sites and a centralized IT service site) in a process that does not formally recognize the importance of worker participation. Technical glitches and help suggestions are passed from local service workers to the central IT office at the sole discretion of local management who, themselves, have little direct experience with the new work and IT systems. When workers notice a new problem with the computer system, they attempt to resolve the issue on their own, they consult co-workers for advice, they go to their supervisors for direction, and the supervisors take complaints – or "log tickets" – with the on-site SDMT specialist and the centrally located help desk. In many cases, workers report a general lack of responsiveness for weeks, even months, on end. Even the local SDMT specialists have registered frustration over the lack of response to logged tickets:

> *S*: With the SDMT you phone the help desk and they log the ticket. That's all they do. They don't answer questions. They can't tell you I've seen that before and this is what they did, you know, do you want to try that? So it's only from what we've done that we know . . . And you phone for a data fix and it's still another six weeks. Even when you know what needs to be done, it could be six weeks before the ticket's resolved.
>
> *I*: Why is that?
>
> *S*: Because there's 350,000 tickets (BDBTH0303).

In short, problems remain unresolved and the front line workers are left on their own to create a temporary fix or "work-around" to ensure the client gets his/her social assistance payments on time. As such, the re-design process has become a highly contested form of multi-organizational learning as workers appear to have lost a good-faith belief that their concerns are being dealt with (or reported back on) in a timely and reasonable fashion:

> The suggestions that workers make, nine out of ten times, are not validated or implemented. What we are seeing is a complete lack of trust, and a divide. The classic "us" versus "them" is absolutely a reality at that workplace, since the changes, and I suspect it will get worst (H1AT0303).

Closely related to this struggle to improve the system – also partially linked to newly invigorated worker learning networks – is that the new work/technological context has given rise to a new culture of oppositional resistance (partially signaled in H1AT0303's comments above).

Extending our analysis of multi-organizational learning to issues of technological (re)design, our findings also reveal enormous potential for user-based, or rather, "labour-centric" technological development; that is, our findings underscore the possibility of informing Web-based, IT design and re-design trajectories from the standpoint of front line service workers to create what Suchman (2002) refers to as "practice-based" design and technology historians such as Mumford (1964) have referred to as a "democratic" rather than an "authoritarian" technic. In the sense of these alternative potentials, our findings run counter to many current processes that have been market-driven and led by multinational managerial consultants such as Accenture, whose *modus operandi* is to

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limit genuine worker participation in advancing an agenda of privatization, deregulation, and government outsourcing:

> As I said earlier, I don't dislike the system at all, but I think where we are now is where we should have started . . . What ended up happening was that we had a system created by their people with their perception of what we needed. The info they obtained from our front line workers or trainers or managers was taken but to a small amount. They did it only to appease, but not in a way that was concrete and helpful. Now we are in a system that's corrupt and flawed (H1AT0303).

Conclusions: what is old is new again?

Our opening report on the analysis of informal worker learning networks, similar to those explored in Orr (1996), Livingstone and Sawchuk (2003) and Sawchuk (2003), reveals barriers and openings for worker knowledge production and influence. Work-based learning is implicated throughout the many dimensions of workplace reorganization and technological change, reported only briefly in this article. But it is important to register that learning is largely (though not exclusively) an expression of workers' agency and ability to cope with, resist, appropriate and shape their situation. Therefore, learning in this instance provides us with an important framework in which to investigate the specific characteristics of work, technology and learning – and how all three factors interact when set against a backdrop (suggested but not explored in this article) of the feminization of work within a public sector setting. More specifically, what we see is that remarkably familiar (neo-Taylorist) power struggles and labour process design issues are being played out in a context that, on first glance, may seem to have all the trappings of high-tech, knowledge intensive, service work thought to be definitive of the much-heralded "new economy".

Notes

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2 These letters and numbers represent research subject codes.

3 I = Interviewer speaks; S = Interview subject speaks.

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