

# Unions implementing managerial techniques

*National unions are gradually adopting the sophisticated management selection and training practices of business and government but employment and promotion decisions remain essentially political*

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In sharp contrast to their counterparts at the bargaining tables, labor unions have traditionally given relatively little attention to the selection and training of their professional staff.<sup>1</sup> Results of a 1977–78 survey of national unions and employee organizations suggest an emerging trend bringing them more into line with established personnel practices of business and government. College graduates, long sought by other employers, find doors beginning to open in labor unions; the recent elections of college graduates as president and secretary-treasurer of the AFL-CIO symbolize this change.<sup>2</sup> Formalized training, generally required for upward mobility in business and government, is gaining acceptance among unions. Even more striking, some of the recently inaugurated union staff training programs resemble in content and format those offered for management in other organizations.

The literature describing and analyzing personnel policies of business and government is voluminous. By contrast, little is known about the personnel practices of labor unions.<sup>3</sup> This study, designed as a first step in filling this gap, addressed several key questions: How do national unions recruit and select their representatives? What functions do these staff members perform? What qualifications are expected of them? And, how are they trained for their responsibilities? In analyzing the survey

results, comparisons are made, where possible, with the selection and training of managers in business and government.

## **Divergent personnel practices**

*Selection.* In business and government, selection of management personnel is usually a carefully planned and somewhat elaborate process based on formal criteria and objective tests designed to screen applicants for desired attributes. Education and job-related training are given heavy weight in the selection criteria.

National unions, however, have traditionally used a political staff selection process, rewarding demonstrated leadership and loyalty at the local level.<sup>4</sup> In 1956, Harold Wilensky's path-breaking study of *Intellectuals in Labor Unions* found that the relatively few college graduates then employed by national unions functioned in narrowly defined roles. These "intellectuals" tended to be viewed with suspicion by union officials and tried to downplay their college educations by "proclaiming their faith in the superiority of the untrained man."<sup>5</sup>

*Training.* Business organizations invest heavily in personnel training. A recent survey by the Conference Board reports that most companies require their managers to continue their professional education. In 1975, approximately 1.3 million managers and supervisors were trained at a direct cost to employers of almost half a billion dollars. As a result, in-house management

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training has become a major profession, accounting for the employment of 45,000 specialists.<sup>6</sup>

Several companies operate year-round campuses which rival institutions of higher education. For example, American Telephone and Telegraph Co. sends 10,000 of its managers each year to its residential training center, which has an annual budget of \$20 million.<sup>7</sup>

Corporations supplement in-house training with support for the American Management Association, whose educational programs annually attract more than 60,000 managers, and with numerous special courses offered by colleges and universities. Moreover, the business training boom has created a whole new industry of 1,000 or more management consultants specializing in the field.<sup>8</sup> Mid-level managers, the counterparts to international representatives in labor unions, are the principal targets of these business-sponsored training programs.<sup>9</sup>

The training of managers generally deals with the functions of planning, organization, and control, with emphasis on interpersonal skills, problem-solving, and goal-setting. A heavy investment in methodology has produced a variety of approaches to teaching, including videotapes and computer simulations. Supervised on-the-job training, through a planned system of job rotation, is widely used to supplement classroom instruction.<sup>10</sup>

In contrast, staff members of labor unions have traditionally acquired their skills and knowledge in the "School of Hard Knocks"—in the shop, at the bargaining table, and on the picket line. Until recently, few alternatives have been available. Moreover, efforts to fill the training void have been mainly short-lived and out of the mainstream of American labor union practice.<sup>11</sup>

Given the growing complexity of union-management relations, how are unions responding to the obvious disparity in formal education and training between union and management representatives? This is the question which led to our study, the first analysis of union staff training since the Survey of Labor Education conducted under the auspices of the National Institute of Labor Education more than a decade ago.<sup>12</sup>

### **Survey results and some hypotheses**

The survey of national unions reveals increased recruiting of both service staff and specialists from outside the unions, growing union emphasis on staff training, and emerging elements of similarity between union and management training in content and methodology. (See appendix for a description of the survey scope and method.)

These are the major generalizations which emerge from survey data. There are, however, differences among unions, resulting, in part, from such factors as: (1) size of organization, (2) type of membership, (3)

union structure, (4) employer practices, (5) changes facing the organization, and (6) union traditions and current outlook of leadership.

It is logical to expect that union personnel practices will vary with size of membership, because this largely determines the resources which are available. Thus, larger unions are more likely to hire specialists to provide a wide range of services to their members, and to mount their own staff training programs. Also, one might predict that membership characteristics will be reflected in the selection and training of staff representatives. In particular, the weight given to formal education may be expected to vary with the level of education of the membership, with unions of professional employees more likely to hire college graduates and turn to universities for staff training than unions which represent manual workers. However, observation of the labor scene suggests that structure is the most important variable in explaining differences among unions. Industrial unions which deal in national and international product markets are characterized by a centralized structure, while those which function in local labor markets tend to be decentralized. Thus, industrial unions might be expected to employ relatively larger numbers of national representatives to perform a wider variety of assignments. With greater responsibility at the national level, industrial unions would also be likely to place more emphasis on training.

Other potential influences on union personnel practices are less tangible and therefore more difficult to assess. For example, unions may emulate the practices of the employers with which they negotiate. Accordingly, unions dealing with major corporations, such as General Motors or American Telephone and Telegraph, are more likely to hire technical specialists from outside the organization, and to provide staff training than unions which represent employees in small firms. Inspiration to adopt new programs may also come about as a result of challenges facing the union; rapid expansion, competition from rival unions, employer opposition, government regulation, and economic decline may give impetus to training and hiring trained personnel from outside. And finally, not to be discounted are union traditions and the viewpoints of current leadership. Unions with a history of social and political involvement have traditionally emphasized education, and those headed by college graduates or self-educated "intellectuals" might also be expected to look for and encourage these attributes among staff.

### **Recruitment and selection**

*International representatives.* While union experience remains the primary criterion for selection of international representatives and organizers, approximately 3 out of 10 of the surveyed unions currently hire some "outsid-

ers” to perform these basic functions. Choosing international staff is normally the prerogative of national officers who, under most union constitutions, have the exclusive power to hire and fire. Most unions tend to recruit negotiators and organizers exclusively within their own ranks, from among local officers or activists. Sixty percent of our respondents reported that prior membership in the union and experience as a union officer are requirements for appointment to international representative positions, with an additional 12 percent indicating that there are few exceptions to the prior membership requirement. In total, approximately 3 out of 4 unions select their negotiators, administrators, and organizers on the basis of demonstrated qualities of leadership within the organization. Unions tend to see experience as the best teacher and expect prospective staff members to serve an apprenticeship at the local level.

This internal method of selection for union staff is longstanding and well-known.<sup>13</sup> What is surprising is the number of unions (28 percent of our respondents) which currently do look outside the organization to fill some of their openings for international representatives and organizers. The unions which recruit outside their ranks differ from others in type of membership represented, stage of organization, and record of growth.

Unions recruiting staff from outside tend to fall into two extremes based on the characteristics of their members: (1) well-paid professional and technical, and (2) relatively low-paid semi-skilled and unskilled. In the case of the former, outside recruitment is explained by the fact that members are dedicated to their occupational goals and are therefore reluctant to assume full-time union leadership roles. For the achievers in these professions, assumption of union staff positions may be seen as a reduction in status. In contrast, unions which represent mainly low-skilled workers with limited formal education sometime report that it is difficult to recruit “qualified” representatives from the ranks. In both cases, officers supplement inside talent with “outsiders.” It has also been observed that some unions recruit “outsiders” in the initial phases of organization when pay is low and the work demanding and onerous. As the union becomes better established, full-time representative positions are more attractive to “insiders.”

Rapid growth is another factor motivating outside search for personnel. For example, the outside hiring practices of public employee organizations, which constitute the principal growth sector of the American labor movement, reflect pressures stemming from relative inexperience in bargaining and the demands of expanding membership.

Whether they recruit exclusively from within or look to the outside, labor organizations do not specify or enforce a formal education requirement for employment of

international representatives and organizers. However, a growing number recruit new staff from among the graduates of college and university labor relations programs. Many send recruiters to the campus, following the corporate practice. Some try out college students through on-the-job experience: Several recruit at colleges for intern programs which provide experience for potential staff; some merely provide short-term work experience for college students; and a few use this avenue directly for staff recruitment.

*Specialists.* While international representatives and organizers continue to come mainly from the ranks, an increasing number and variety of specialists are recruited from outside sources. Almost all unions (81 percent of our respondents) search outside for specialized talent to fill technical positions. For example, legal counsel has traditionally been recruited in this way. Other positions for which outsiders are most commonly employed, in order of frequency, are: research, education, pension administration, legislative and political affairs, and publications.

This outside talent search for specialists is not new. Professor Wilensky attributed the trend to (1) the emergence of multi-industry unions and (2) growing union involvement with the Federal government, which gives rise to a need for specialized and technical knowledge.<sup>14</sup> What has changed is the number and variety of specialists hired. Unions which currently look outside the membership to fill technical positions are representative of the broad spectrum of organizations in the American labor movement—industrial and craft, white-collar and blue-collar, and public and private sector. The eight reporting unions which rely solely on internal recruitment to fill technical and professional specialties are relatively small organizations with limited resources.

Today, almost all unions hire some of their staff from outside the membership ranks. The only variation occurs with respect to the numbers hired and the roles performed.<sup>15</sup>

## **Training**

How do union staff representatives acquire the skills and knowledge required to fulfill their responsibilities? The survey confirms the impression that, in contrast to the selection of business managers, formal training is rarely a requirement for appointment to union staff and that the “School of Hard Knocks” has been, and still is, the major source of training.

The traditional trade union attitude toward staff development was described by Lawrence Rogin and Marjorie Rachlin in a 1968 study:

“. . . many union leaders do not see any need for training or education. They point out that present union leaders at all levels learned in the school of experience and on the

### Functions of national staff

Responding unions report employing 5,006 full-time international representatives, or persons with an equivalent title such as district representative or, in smaller unions, vice president. The vast majority of professional staff members in national unions are designated "international" representatives, because the unions have membership in more than one country, normally the United States and Canada. Their duties are generally not set forth in written document, such as union constitutions, or in standardized job descriptions as is the practice in most other organizations.

International representatives, as the title implies, represent the national union in relationships with local unions, with collective bargaining as their primary activity. They are also expected to be a source of information about and interpretation of union policy for the membership, and to provide national officers with continuing feedback on membership points of view. Less tangible but often more important is their political responsibility for building support and loyalty at the local level.

Unions responding to our survey report that the four most common functions of international representatives are: (1) negotiating contracts, (2) handling grievances, (3) organizing, and (4) advising local unions on administrative questions. These duties are performed by staff carrying the title of international representative (or the equivalent) in almost all unions. Other reported functions associated with the title include arbitration (five unions), education and training (four), legislative and political activity (three), auditing (three), and community service (two). Unions which expect representatives to perform more diversified functions are usually industrial in structure. This is not surprising, given the greater centralization and broader scope of activities which generally characterize industrial, as compared with craft, unions.

Approximately half of the surveyed unions employ full-time organizers—728 in all—who do not also serve as international representatives. With a few exceptions, these unions are industrial in structure with large memberships. Small craft unions include organizing with other staff assignments or handle this function at the local level.

Our survey, in contrast to earlier reports by the U.S. Department of Labor, indicates an upward trend in employment of staff specialists by national unions. Gus Tyler, assistant president of the International Ladies' Garment Workers Union, explains that unions have to:

"develop the equivalent of the corporate 'system' man at many levels. They also need specialists to play labor's newly enlarged role in the total society. In the media age they need their own image makers; in our politicized economy, they need their own politicians and economists; in this time of the minority movements, they need their own savants about women, youth, the elderly, blacks, and Hispanics." (See Gus Tyler, "The University and the Labor Unions: Educating the Proletariat," *Change*, February 1979, p. 35.)

In smaller unions, the officers are expected to handle all functions with little or no specialized help, while larger organizations, like the Steelworkers and the Auto Workers, have specialized departments for legal advice, administration and negotiation of pension and welfare plans, arbitration, and a number of other services. In particular, the number of union staff employed in education, research, and public relations has grown since the first Bureau of Labor Statistics survey of labor unions in 1949. (See *Directory of National Unions and Employee Associations, 1979*, Bulletin 2079, Bureau of Labor Statistics, 1980, p. 74.)

whole learned well. These unionists feel that the new generation of leaders will learn as they did, by participating in union activity."<sup>16</sup>

This attitude or, in any case, the practice seems to be changing. More than 9 out of 10 of the surveyed unions reported they are involved in some form of staff training. The unions which do not mount their own in-house training programs have been sending staff to programs at the George Meany Center (AFL-CIO) or to university labor education programs. Only three of the surveyed unions are not involved in any type of staff development. The 43 unions engaged in some form of training in 1977-78 represent a substantial increase from the 25 unions which reported such activity in the 1965-66 period.<sup>17</sup> During the same interval, the number of unions conducting their own internal training programs increased from 17 to 37.

What accounts for the recent upsurge in union-sponsored staff training? Reasons cited by the responding unions include: (1) recognized need for developing new leadership, (2) actual or anticipated changes in top leadership, (3) increased responsibilities assigned to international staff, and (4) the growing complexity of staff roles. One union cited its experience in apprenticeship training as an encouragement to train officers and staff at all levels of the organization. Respondents also pointed to the perceived rise in opposition to unions by employers, government officials, and the public as an incentive to strengthen the knowledge and skills of staff.

*The George Meany Center.* The leading center for union staff training in the United States is the George Meany Center for Labor Studies, established by the AFL-CIO in 1968. Catering almost exclusively to full-time union staff, the center in 1979 attracted 3,200 participants to a wide range of course offerings.<sup>18</sup> Even more significant, most (94 out of 106) of the AFL-CIO affiliates have sent staff to the center.<sup>19</sup>

Groundwork for establishment of the center was laid during the early 1960's in a series of Brookings Institution seminars for national union presidents. These top officials, who had themselves participated in educational sessions, subsequently gave their backing to a year-round program of education for their staff members.

Housed in an attractive residential campus setting in Silver Spring, Md., the center is supported by a more than \$1 million annual appropriation from the AFL-CIO which allows courses to be offered tuition-free. Although early plans projected long-term residential programs, most of the course offerings are only 1 week in duration. Subjects include both "bread and butter" (Collective Bargaining and Union Administration), and broader public interest topics ("Energy, Environment, and Transportation," "Dimensions of Corporate Pow-

er," and "International Affairs"). The curriculum also features a number of specialized technical offerings, such as "Labor Journalism" and "Publications Design" for union editors, "Audio Visual Techniques" for union educators, and "Grantsmanship" for the growing number of union officials who seek public and private funding for demonstration and service programs.

Job-related subjects, which dominate the curriculum, are offered on a more advanced level at the center than is generally the case in staff training programs conducted in-house by national unions. For example, study of collective bargaining at the George Meany Center includes a sequence of courses on "Negotiation Techniques," "Advanced Negotiating Techniques," "New Developments in Bargaining," "Pension Bargaining," "Arbitration," and "Advanced Arbitration." The opportunity for sequential study makes possible in-depth treatment even within the limitations of a one-week-at-a-time schedule.

For staff who are encouraged to continue their education because of their experience at the center, a unique college degree program has been developed in cooperation with Antioch College. Its curriculum combines 2 weeks per year of residential study at the center with mentored self-study leading to a bachelor's degree with a major in labor studies. Specifically designed for full-time staff whose work schedules conflict with their college attendance, the George Meany Center-Antioch curriculum grants credit for experience and encourages credit transfers from local educational institutions, thereby facilitating progress toward a degree. Approximately 100 national union staff members are currently enrolled in this degree program. The first diploma was presented by George Meany at the 1975 AFL-CIO Convention. To date, 21 degrees have been awarded.

The center also cooperates in "tailor-made" programs in response to requests by national unions. A practice encouraged by the center is to incorporate educational sessions into staff meetings, making it possible to reach larger numbers of staff and a greater variety of unions.

Surprisingly, building trade unions are currently the leading consumers of center educational services. This illustrates the fact that the center has also broken through to organizations with little or no tradition of educational activity.<sup>20</sup>

Despite its successful record, the center struggles with problems endemic to the history of labor education: (1) continuing resistance on the part of many union officials who do not see the value of staff training, (2) the difficulty of attracting participants to programs which deal with broad social issues or conceptual disciplines, (3) the limitations of a 1-week format prescribed by staff work schedules, and (4) need for research support.<sup>21</sup>

*In-house training.* The major constraints on internal training activity are (1) possibilities for offering released time to staff and (2) training expertise. Results of our survey indicate that the decisive factor in whether international unions sponsor their own staff training programs is size of membership, which is, of course, reflected in resources available. All but one of the unions which do not conduct some form of staff training are small organizations. Twenty-three of the 26 unions with 100,000 or more members run their own programs, while only 3 out of 9 unions with fewer than 50,000 members do so. Where resources are scarce, unions either limit training to "briefings" at staff meetings or to programs conducted by the George Meany Center or a university. A few small unions have no staff training at all.

The importance a union places on training may be judged by whether participation is required. Two out of 3 of the unions which conduct their own training programs report that staff are required to attend. However, many qualified this response by explaining that it is not always possible for employees to comply with the requirement. The United Brotherhood of Carpenters mandates staff training in its constitution, while several other unions require training only for new staff.

According to our respondents, staff reactions to training opportunities have been mixed. One union hinted at a lack of incentive among staff members to attend the sessions, "especially as the staff are usually overloaded with negotiations, arbitrations, grievances, or organizing. Conveniently, one or all of these seem to occur whenever a school is scheduled." Two unions, the Auto Workers and the Teamsters, at one time required all staff members to participate in a residential training program, but later abandoned the requirement, in part due to staff resistance. At the other extreme, the American Federation of Government Employees reported that training was initiated at the insistence of staff who "asked for, and were successful in obtaining a written agreement for one training program per year."

### **Predominant themes**

While training programs vary in form and emphasis, there are common themes. Almost all cover such core subjects as collective bargaining, labor law, and organizing. Fifteen of the reporting unions—almost half of those with staff training programs—concentrate exclusively on core subjects relating directly to the principal functions performed by international staff. Most commonly offered, in order of frequency, are courses on organizing, labor law, collective bargaining, grievance handling, and arbitration.

In other unions, training also normally orients staff to the organization's structure (such as the roles of headquarters departments, and the duties of the of-

icers), policies (political, economic, and administrative), and philosophy. Interspersed are briefings on current developments in labor and labor-management relations. Major variations from or add-ons to core subject matter usually involve training in legislation, intergroup relations, and such personal skills as speaking, writing, and listening. Several national unions also educate some staff as instructors. New and emerging are programs designed to provide international representatives with skills in administrative management—planning, supervising, and evaluating the results of union activities.

*Collective bargaining.* Almost all of the reported staff training programs include some aspect of collective bargaining. Even though this is the subject with which national staff members are most familiar through experience, training programs aim to sharpen skills in techniques of negotiating contracts, handling grievances, and presenting cases for third-party dispute settlement. A variety of action training methods is employed including role playing, case study analysis, and video feedback. Expertise in collective bargaining is of particular importance to unions which have been recently organized. For example, the Farm Workers union, which recently faced the challenge of reorienting its staff from organizing to bargaining, established a year-long training program which combines classroom education with field work.

*Legislation and political action.* Many union training programs also include topics which focus on legislation and political action as related to the bargaining function. Among the most common are pension bargaining and its legal complement, the Employee Retirement Income Security Act; implications of Equal Employment Opportunity legislation for contract negotiations; and health and safety issues in bargaining, within the context of the Occupational Safety and Health Act.

Staff training conducted by the International Union of Electrical Workers affords an example of a program in which legislation, particularly affirmative action, receives major emphasis. The Teamsters' recently inaugurated training program for national and local staff includes exposure to legislation of special concern to the trucking industry, such as deregulation and its implications for collective bargaining.<sup>22</sup> And, as a result of the U.S. Department of Labor's New Directions grant program, an increasing number of unions, in such industries as steel, textiles, oil and chemicals, auto manufacturing, and building trades, offer specialized training in occupational safety and health for national staff and local union leadership.

While economics is rarely offered as a separate subject, eight reporting unions deal with economic issues in relation to bargaining and political action. For example,

the Amalgamated Clothing and Textile Workers Union offers perspectives on the national economy as a background for political action questions.<sup>23</sup> And, the Ladies' Garment Workers Union also includes national economic issues and the economic problems of the garment industry in its curriculum for new staff.<sup>24</sup>

*Organizing the unorganized.* Twenty-three unions provide their staff with instruction in ways to reach heretofore unorganized or inactive workers. Recognizing that women and minorities have traditionally been underrepresented in unions, particularly in leadership and activist roles, several unions not only train their staff in EEOC regulations but also orient them to the problems and interests of minorities and women. In the public sector, where minorities have been gaining in employment and women constitute a large percentage of the membership, two unions offer courses on special techniques for organizing these groups. Similarly, a few unions offer courses specially designed to prepare staff members for the challenges of organizing professional and white-collar workers. In the construction industry, where the percentage of unionized workers has been declining, one organization developed a course dealing with outreach to young workers.

Several unions train their full-time organizing staff members in such techniques as communications and public relations skills, and legal regulations relating to union organizing campaigns. The Organizing Department of the Auto Workers, for example, conducts periodic training sessions designed to evaluate past experience and devise more effective approaches to enlisting new membership.<sup>25</sup> The American Federation of State, County, and Municipal Employees has used the services of a nonprofit consulting organization to train organizers in the dynamics of interpersonal relations as applied to organizing.<sup>26</sup> The Industrial Union Department of the AFL-CIO, in addition to conducting briefings on legal regulations, provides training in community action techniques based on the Saul Alinsky model.<sup>27</sup>

*Education of new staff.* Forty-four responding unions report some form of training for new staff members; almost all list "on-the-job training" as the main component, while 27 organizations report that new employees are supervised by experienced staff for the purpose of orientation and training. The Retail Clerks (recently merged into the Food and Commercial Workers Union) is the only union which reported a planned system of job rotation, a practice common in business and government.

Thirty unions conduct classroom training programs for orientation purposes. These programs usually focus on the union's structure, history, and resources avail-

able from the national headquarters. Several organizations send all new representatives to the George Meany Center. Notable in terms of training provided for new staff are the Ladies' Garment Workers Union and the Communications Workers of America.

The Ladies' Garment Workers Union inaugurated the first and most comprehensive of these programs. Its staff training institute, established in 1950, was an innovative break from tradition, offering a year-long, full-time training experience for recent or potential recruits. Training included both classroom and field work. After a few years, the format was drastically altered and reduced in length and the union's recruiting emphasis shifted from "outsiders" to "insiders." Currently the Ladies' Garment Workers Union conducts one institute of 6-weeks' duration each year for potential or recently appointed staff members, to orient them to their responsibilities, the problems of the garment industry, and relevant political issues.<sup>28</sup>

Another longstanding and intensive training program for new staff is offered by the Communication Workers. Like the Ladies' Garment Workers Union program, the Communication Workers staff training has undergone a number of revisions, reflecting continuing reappraisal of training needs. In its original form, the program involved exposure to a "college type" liberal arts education. Parallel to the much-publicized Executive Liberal Arts seminars offered by the American Telegraph and Telephone Co. (the Communication Workers' counterpart at the bargaining table), the union offered new staff a 6-month residential experience on a university campus with seminars focusing on the humanities and social sciences. The liberal arts program was discontinued because the officers considered the time off the job to be excessive and, more importantly, observed no relationship between training and job performance.<sup>29</sup>

As an alternative, the union president decided on a shift in training design which would better equip staff members for their assignments. When the training needs of new staff were assessed, the key finding was the need to ease the transition from closely supervised work as telephone employees to independent assignments as staff representatives. As a result, the union inaugurated a 6-week training program for new staff which emphasized problem solving and interpersonal relations. Borrowing from "Management by Objectives" concepts used in business and government, the training sessions stimulate participants to set specific measurable goals, and develop plans related to their functions as organizers, negotiators, and administrators. A mid-term, back-on-the-job recess is used as a testing period for new concepts, the results of which are subsequently reported and analyzed. Staff members are also trained in techniques of evaluating results of planning and goal-setting.<sup>30</sup>

*Personal skills.* Almost half the unions with educational programs for staff include training in such basic skills as public speaking, writing, reading, and problem solving, in addition to core subjects. Several of the education directors interviewed indicated that, when staff members were polled with respect to their training needs, personal skills led the list.

An interesting experiment with new approaches to developing individual skills is the staff training program inaugurated by the International Union of Operating Engineers. In response to observed limitations of international staff members in written and oral communications skills, the union contracted with a consulting firm for a training design. The result was a training program in "The Communications and Influence Process." Drawing on management education experience and methodology, the Operating Engineers' program focuses on leadership style—"controlling," "defensive," "relinquishing," and "developmental"—with the latter considered to be the ideal. Case studies are drawn from union political activities, jurisdictional disputes, and other conflict situations. Participants meet in small groups with observers, where they practice oral and written communication skills and problem solving. At the conclusion, each participant is given a take-home assignment designed to reinforce training.<sup>31</sup>

*Managerial and behavioral effectiveness.* The application of the behavioral sciences to related goals and problems, a central theme of training for managers in business and government, is currently featured in several union staff training programs. Among the unions, diverse in structure and tradition, which have incorporated this type of subject matter in their staff training efforts are the Communications Workers, the American Federation of Government Employees, the Steelworkers, and the Operating Engineers (AFL-CIO), and the National Education Association (unaffiliated). Key components of the programs are borrowed from management theory and practice. While materials and illustrations have been adapted to the needs and practices of unions, the basic concepts are the same. In several cases, the instructors and materials suppliers have been consultants who specialized in the training of business managers.

As noted above, training for new Communications Workers' staff members includes intensive exposure to "Management by Objectives," a popular subject in managerial training programs. The training program of the Operating Engineers also introduced international staff to a concept of leadership styles common to a wide variety of management training programs.

The American Federation of Government Employees adapted "Transactional Analysis," based on the best-selling book *The Games People Play*<sup>32</sup> and widely used in management training, as the centerpiece of its

3-week training program, on the theme: "Creating an Effective Communications Climate." The purpose of the program was to encourage national representatives to examine their roles, and to assess ways to relate to others in the organization.

Classroom sessions were videotaped so that the participants could see themselves in action. According to the union's Education Director this nontraditional approach to leadership training was selected to stimulate fresh thinking about employee relations in Federal agencies, to cope with the need for continuous organizing in the absence of an agency or union shop, to encourage an active outreach to women and minorities and to confront the rigidities of civil service regulations and the "paternalism of government administration."<sup>33</sup>

The National Education Association conducts a year-round program of staff training, with strong emphasis on interpersonal relations, communications, and decision-making. Among the workshops offered are "Psychology of Groups," and "Models for Management," which focus on interpersonal relations and ways to make decisions and motivate people, subjects which are also popular in the training of managers in business and government. The concept of union leadership as a form of management is further reflected in such workshop titles as "Strike Management" and "Representation Election Management."<sup>34</sup>

The Steelworkers recently opened a residential school at Linden Hall, near Pittsburgh, which is largely devoted to staff training. The curriculum emphasizes "Human Sciences," including behavior and communications.<sup>35</sup>

A characteristic common to three of the unions which have experimented with management training concepts and methodology (the National Education Association, Communication Workers, and the American Federation of Government Employees) is a bargaining relationship with large-scale organizations having centralized personnel policies. New approaches to staff training represent attempts to equip staff to make independent and analytical decisions in an environment in which rules and regulations dominate the behavior of employees.

*Instructor training.* In many unions, international staff members are expected to provide leadership training for local union officials. Several unions, therefore, conduct specialized training in methods of teaching. Among these are the Auto Workers, the American Federation of State, County, and Municipal Employees, the Steelworkers, the Hospital and Health Care Workers, and the Farm Workers. Not surprisingly, given the nature of its membership, the American Federation of Teachers gives major emphasis to the membership training function of its staff. Because teaching is a basic function of all leadership positions, knowledge of psychology and



techniques of adult education is seen as a valuable tool for international representatives both in and out of the classroom. The Farm Workers union, for example, relies heavily on staff as instructors. Its trainers studied both content and teaching methodology at Cornell University's School of Industrial and Labor Relations, and are responsible for all staff training in their union.

### **Outside training sources**

*Colleges and universities.* Institutions of higher learning play a relatively minor role in training union staff. The one continuing university-sponsored program for union staff is conducted by Harvard University. Harvard offers an annual 13-week seminar with the announced objective of "training for executive responsibility in unions." Initiated in 1942, this seminar, while highly rated by participants, reaches a relatively small number of international union executives and staff.

Current contributions by other colleges and universities include: (1) resident degree offerings which prepare students for a career in labor-related fields, (2) part-time credit, certificate, and degree programs which enroll union activists, including some full-time union representatives, (3) occasional staff training seminars offered in cooperation with the George Meany Center or national unions, and (4) conferences and workshops on specialized topics designed to attract union leadership. While half of the responding unions reported sending national staff members to a college or university program, only 11 universities with labor education centers (a minority of the questionnaire respondents) reported conducting programs which were designed exclusively for union staff. Although this number is small in comparison with the large scale educational service which universities provide to business and industry, the number of such institutions directly involved in staff training has more than doubled since the Rogin-Rachlin survey in 1965.

Resident degree programs in industrial relations, a major source of personnel specialists for business and government, place relatively few of their graduates in unions. For example, less than 2 percent of the graduates of Cornell's School of Industrial and Labor Relations, the largest in the field, find jobs in unions. Reports from other university industrial and labor relations centers indicate a similar pattern. Again the trend is upward, but the numbers remain small.

There are three resident degree programs specially designed for individuals aspiring to a union career; Pennsylvania State University, Rutgers University, and the University of Massachusetts place most of their labor studies graduates in unions or union-related positions. Nevertheless, university labor and labor relations centers, in total, supply a relatively small number of staff members to international unions. As previously indicated, the underutilization of resident degree pro-

grams for staff training is related to unions' tendency to select staff from the ranks; once on staff, union representatives find it difficult, if not impossible, to take time out for full-time study.

However, part-time study for union members, activists, and staff is growing in importance.

Labor studies constitutes a major in more than 75 colleges<sup>36</sup> which enroll actual and potential staff members and provide them with a combination of work-related skills (such as collective bargaining, political action, organizing, union administration, and communications), along with a broader exposure to the social sciences and humanities. The contribution of labor studies credit and degree programs is difficult to assess because they are relatively new and their impact is likely to be long term in nature. Full-time union staff constitute a relatively small portion of total enrollment;<sup>37</sup> even the George Meany Center-Antioch College labor studies program, designed exclusively for full-time union staff, has an annual enrollment of fewer than 100, a tiny fraction of the total eligible population. However, there is some evidence that graduates of these programs are subsequently promoted to union staff positions, suggesting a potential role of colleges and universities in the professionalization of the occupation.

In recent years, university labor centers have responded to an increasing number of staff training requests from national unions and the George Meany Center. Preparation for arbitration, collective bargaining, and labor legislation are dominant themes in these requested programs. Several universities have developed specializations in other subjects for which they are known among national unions; for example, industrial engineering and employment testing at the University of Wisconsin, international affairs at Georgetown University, psychology of organizing at the University of Missouri, and instructor training at Cornell.

From time to time, university labor education centers initiate conferences and workshops which are promoted on an inter-union basis and designed primarily for full-time union representatives. Conferences generally deal with public policy issues of concern to unions; examples include "Labor and International Trade," "Duty of Fair Representation," and "Urban Planning." Workshops provide training in such skills as "Preparation for Arbitration," "Organizing," and "Legislative Lobbying."

To summarize, the contribution of higher education to union staff training, while growing, is miniscule when compared with its massive role in training business management.

*Other resources.* Consultants are leading providers of management education to business and government. In recent years, a few of these consultants have played a

role in union staff training. Several labor education professionals are periodically called on for advice, but there is no true counterpart to management consulting in the labor field. Nor is there the equivalent of the American Management Association and the Conference Board, independently organized institutions which cater to the educational and research needs of business.

The Midwest Academy, a nonprofit organization specializing in training community organizers, has been used by several unions for training of organizers. Union staff also participate in training sessions conducted by the American Arbitration Association and the Federal Mediation and Conciliation Service.

To date, while there are actual or potential outside resources, unions have relied primarily on internally designed programs and the George Meany Center for staff training.

AMERICAN LABOR UNIONS are increasingly adopting two personnel practices which have been characteristic

of business in the United States—the search for outside talent and support for personnel training. Nonetheless, important differences persist, reflecting the essentially political structure of labor unions. As membership organizations, the leadership imperative is not the market test but responsiveness to the expressed needs and preferences of the rank and file. Thus, staff selection continues to rely on a record of achievement and loyalty at the local level. Political reality limits the role of “outsiders” as well as the emphasis which unions place on formal training and education.

Fred Hoehler, Jr., executive director of the George Meany Center, in a recent article on the “coming of age” of labor education, pointed to its growing acceptance and support by union leadership. Nonetheless, taking account of the contrast in volume and investment when compared with the training activities of business and government he concluded: “We are coming of age, perhaps, but we still have a long trek ahead.”<sup>38</sup> □

—FOOTNOTES—

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<sup>1</sup>In 1964, Russell Allen, a long-time labor educator and union activist, commented that “the cultural lag in the labor movement with respect to leadership programs is frightening. No other institution in American society is so careless of the technical and intellectual preparation of its staff and of the training and retraining of its leadership.” See “The Professional in Unions and His Educational Preparation,” *Industrial and Labor Relations Review*, October 1964, pp. 16–19. This point is also discussed by Al Nash and May Nash in *Labor Unions and Labor Education*, Monograph Series No. 1 (New York, University Labor Education Association, 1970); and by Lois Gray in “Training of Union Officials,” *Labor Law Journal*, August 1975, pp. 472–76.

<sup>2</sup>A. H. Raskin, in “Unions Turning to the Law College for Top Officials,” *The New York Times*, June 22, 1977, pp. D1 and D7, notes that a number of recently elected international union officers were college graduates, including several with law degrees. An earlier survey found that only 17 percent of international union presidents, vice-presidents, and secretary-treasurers had completed college. See also Abraham Friedman, “Characteristics of National and International Union Leaders,” unpublished manuscript, October 1967, quoted in Derek C. Bok and John T. Dunlop, *Labor and the American Community*, (New York, Simon and Schuster, 1970), p. 181.

<sup>3</sup>Bok and Dunlop, in *Labor and the American Community*, p. 138, note: “The administration of unions is a subject about which very little is known. This information gap grows increasingly serious in an era when the techniques of management have become highly sophisticated and the importance of administration so widely understood.” The authors raise a number of questions about the selection and training of union leadership, emphasizing the impact of the political process (pp. 138–88). The only published empirical study dealing with the functions of international union staff is an article by Myron Joseph, “The Role of the Field Staff Representative,” *Industrial and Labor Relations Review*, April 1955, pp. 353–69. British industrial relations literature includes several studies dealing with this topic, including William Brown and Margaret Lawson, “The Training of Trade Union Officers,” *British Journal of Industrial Relations*, November 1973, pp. 431–48 (Reprint Series No. 10 of the Social Sciences

Research Council); and H. A. Clegg, A. J. Kitlick, and Rex Adams, *Trade Union Officers* (Oxford, England, Basil Blackwell, 1961). For Canadian experience, see Roy J. Adams, “The Work of the Trade Union Field Officers,” Reference Paper No. 77–01 (Hamilton, Ont., McMaster University, 1978).

<sup>4</sup>A 1951 study found that “International representatives, organizers, directors of organizations, line negotiators, and administrators, made their way up the ranks by election, then appointment.” See C. Wright Mills, “Leaders of Unions,” in B. S. Hardman and Maurice F. Neufeld, eds., *House of Labor* (New York, Prentice-Hall, 1951), p. 37. Bok and Dunlop, in *Labor and the American Community*, reported that “Almost all unions are alike in choosing the bulk of their leaders from within the organization.” They note the recruitment of “outsiders” only for specialist positions as attorneys, accountants, and statisticians.

<sup>5</sup>Harold Welinsky, *Intellectuals in Labor Unions* (Glencoe, Ill., The Free Press, 1956), p. 273.

<sup>6</sup>Seymour Lusterman, *Education in Industry* (New York, The Conference Board, Inc., 1977), pp. 6, and 11–22.

<sup>7</sup>Stan Luxenberg, “Business is Big in Education, Too,” *The New York Times*, Jan. 7, 1979, Education Supplement, p. 15.

<sup>8</sup>“The Big Business of Teaching Managers,” *Business Week*, July 25, 1977, p. 106.

<sup>9</sup>“The Big Business of Teaching Managers,” p. 106. Conclusions in the article are based on the records of Mantread, Inc., a company which acts as a clearing house for company selection of training programs.

<sup>10</sup>Lusterman, *Education in Industry*, pp. 86–90.

<sup>11</sup>Gray, “Training of Labor Union Officials,” recounts the rise and fall of various union staff training programs.

<sup>12</sup>The most recent survey of union education and training programs was in 1965. See Lawrence Rogin and Marjorie Rachlin, *Labor Education in the United States*, (Washington, D.C., National Institute of Labor Education, 1968).

<sup>13</sup>This traditional route to union staff appointment was described by C. Wright Mills in “Leaders of Unions,” p. 37.

<sup>14</sup>Harold Welinsky, *Intellectuals in Labor Unions*, p. 197.

<sup>15</sup>Implications for universities and colleges in the trend toward hiring “outsiders” are developed in Lois Gray, “Trends in Selection and Training of Union Staff—Implications for Colleges and Universities.”

*Labor Studies Journal*, Spring 1980, pp. 13–24.

<sup>10</sup> Rogin and Rachlin, *Labor Education in the United States*, p. 55.

<sup>11</sup> *Ibid.*, pp. 84–88.

<sup>12</sup> *AFL-CIO News*, Nov. 17, 1979, p. 3. The George Meany Center accepts both local and international staff.

<sup>13</sup> Interviews with Fred Hoehler, Jr., Director of the George Meany Center, April 1977 and October 1979.

<sup>14</sup> Rogin and Rachlin, *Labor Education in the United States*, pp. 83–95. Until recently, the major supporters of union education, whether for officials or rank and file, were the industrial unions.

<sup>15</sup> Fred K. Hoehler, Jr., “Staff Training Programs,” speech before the AFL-CIO Education Directors Conference, Mar. 6, 1978.

<sup>16</sup> Interview with Art Kane, Director of Education, IBT, October 1980.

<sup>17</sup> Interview with William Elkuss, Director of Education, ACTWU, April 1978.

<sup>18</sup> Interviews with Gus Tyler, Assistant President, ILGWU, March 1977 and October 1979.

<sup>19</sup> Interview with Martin Gerber, Vice President and Director of Organization, UAW, June 1980.

<sup>20</sup> Interview with Larry Rogin, Educational Consultant to AFSCME, March 1979.

<sup>21</sup> Interview with Howard Samuel, Director of Industrial Union Department, AFL-CIO, May 1980.

<sup>22</sup> Tyler interview, October 1979.

<sup>23</sup> Interview with Steve Confer, former Director of Education for CWA, March 1977.

<sup>24</sup> From author’s own review of course materials; Confer interview, March 1977; and discussion with John Kutstad, Director of Education, CWA, October 1979.

<sup>25</sup> Interview with Reese Hammond, Director of Education and Training, IUOE, June 1977, and author’s review of course materials.

<sup>26</sup> Eric Berne, *The Games People Play* (New York, Ballantine Books, Inc., 1964).

<sup>27</sup> Interview with Art Kane, former Director of Education for AFGE (who was responsible for introducing the program described), June 1977, and review of course materials.

<sup>28</sup> Interview with Carl Elvin, Organization Specialist, NEA, July 1978, and review of course materials.

<sup>29</sup> Interview with George Butsika, former Director of Education, USA, AFL-CIO, April 1978, and review of course outlines.

<sup>30</sup> Interview with Art Shy, Administrator of Education Programs, UAW, March 1979.

<sup>31</sup> Lois Gray, “Academic Degrees for Labor Studies,” *Monthly Labor Review*, June 1977, p. 17, lists 47 programs, based on a 1976 survey. For 1980, the American Association of Community and Junior Colleges reported an additional 28 programs.

<sup>32</sup> *The 1980 Laborite* (Silver Spring, Md., George Meany Center for Labor Studies, 1980).

## APPENDIX: Survey methodology

In 1977, a questionnaire dealing with selection and training of professional staff was distributed to all national unions affiliated with the AFL-CIO and all major independent unions. (Local unions were not included.) Forty unions responded to the questionnaire. Additional information was obtained through interviews during 1977–79 with 31 labor educators associated with the most active union staff training programs, most of whom had replied to the questionnaire.

Based on BLS estimates for 1974, the 48 unions for which information was eventually collected had a combined membership of 16.4 million, or 76 percent of the total membership of all national unions in the United States. Ranging in membership from 3,000 to over 1.5 million, the responding unions represent a cross-section of labor organizations, both AFL-CIO and independent;

craft and industrial; and public and private sector. While most have a long tradition of collective bargaining, a number have only recently undertaken this function. Some have been growing in membership; others have experienced a decline.

To assess the use of outside resources for staff training, a second questionnaire was mailed to colleges and universities affiliated with the University and College Labor Education Association, with telephone follow-up of nonrespondents. Twenty-four of 42 institutions responded to the mail survey. Additional information was obtained through personal interviews with 10 directors of university labor education centers. Responding universities are the major centers for labor education at the college level, and represent the range of activity characteristic of this field.