

Organizing the Organized: Structural Change, Organizing Strategies, and Member Participation in a Union Local of Service Workers

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Have you ever met Ernest [a union field representative]? He's the one that started there, the first time. I remember that he came [to my building] and they were handling these vacation checks for my wife and myself. And we already considered that check gone. He went and said "No, you have the right to the check" . . . And he took his [notebook] and wrote down. "What's your name? OK, I will look this up." And then, shortly after, he comes back with the check. And *from then on, he started to pull us in*. I started alone among twenty-some that we were [at my building]. I started to go alone [to union meetings and rallies]. Then I took my wife, because the two of us worked together [as janitors]. And then we started to pull another one in, and another one, until I got almost everybody in . . . That's how it was, with the talking and everything. (Interview with Domingo, activist worker; translation from Spanish, emphasis added by the author)

This is how Domingo, a Mexican-born janitor, related how he became a union activist. Domingo's story offers a glimpse of the formation of reciprocity-based relations between leaders and members in an organizing union local. Over time, Local Z's union leaders and activists had developed a system of mutual obligations linking member mobilization to union "help" with workplace problems. Union leaders would hear about workers' problems and provide them with assistance. In return, activists would show up for rallies, meetings, and demonstrations. Through this ongoing exchange, leaders and activists would learn to trust each other and get other workers involved in organizing activities. My dissertation studied closely this process of informal exchange, what it

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meant for organizing success, and how it was partially unraveled by internal reforms designed to transfer resources from service to organizing.

My case study is a union local whose organizing success, committed membership, and reform-minded leaders stand out against the deteriorating condition of most American unions.¹ In 2004—the fifth year of my fieldwork—Local Z had approximately 40,000 members in three neighboring states. The majority of its membership, 32,500, belonged to the *building services division*. Building services members included janitors in residential, commercial office, and public buildings; doormen; security officers; airport janitors; and security screeners. Local Z's use of resources and personnel exhibited a clear organizing focus, with an organizing director, five full-time organizers, and four researchers on staff. Furthermore, Local Z officers had to follow the international union's mandatory guidelines, which, since 2000, required all union locals to devote at least 20 percent of their budget to organizing.

Borrowing from Ragin's (1994) language, the first goal of my dissertation is to address the question, "What is this a case of?" This question relates to one of the main issues under discussion in the labor revitalization debate—namely, What model of unionism should replace the traditional service or business model? The service model is based on a strict delimitation of responsibilities between union leaders and the rank-and-file members. A members role is mostly restricted to paying dues. A leaders role, in turn, is to represent members at the workplace by handling workplace grievances and at the bargaining table by negotiating wages, benefits, and working conditions (Heery et al. 2002). This delimitation of tasks has hindered unions' capacity to mobilize against a hostile political and legal environment. For many scholars and participants, a new model of unionism is needed to stop and reverse the labor movement's decline (Voss and Sherman 2000).

One of the most discussed alternatives to the service model is what is known as the organizing local approach. In this model, union relationships with external actors, internal structures, the use of resources, and members' and leaders' contributions are all directed toward the goal of organizing new workers. Defenders of the organizing local approach see it as a viable, and, in some cases, the only available option to "build union power," engage union members, and regain unions' economic and social relevance (Lerner 2003). Critics, on the other hand, portray the organizing local approach as a strongly top-down vision for the labor movement, one that reduces member involvement to "showing up" at rallies for campaigns designed and orchestrated from above (Eisenscher 1999).

In a very general sense, I answered the question "What is this a case of?" at the onset of my research by selecting a best-practices organizing local. However, my research contributes to developing the content beneath the label

by examining more closely the actual role and influence of activists and their relationships with union leaders and the rank-and-file at large. In doing so, my research exposes the underpinnings of member mobilization in organizing campaigns and reveals different meanings of union participation, beyond top officers' calls for building power and organizing the unorganized. These findings enrich the characterization of the organizing local approach and reassess existing evaluations of its merits and pitfalls.

The second goal of my dissertation is to identify the conditions for successful union reform. This goal can be broken down into two different research questions. First, how can union locals overcome strong external and internal inertial pressures against reform? Second, how can reformers strengthen a local's organizing orientation without undermining members' trust in the union?

My first question deals with the conditions necessary to transform organizational habits and routines so that strategic planning, tactical innovations, and member mobilization do not remain confined to particular union campaigns (Hickey 2004). I answer this question by comparing the outcomes of organizational reform in two branches of the local. In one branch, the residential division, changes in the union structure contributed to averting de-unionization and strengthened bargaining power in contract campaigns. However, reforms did not fully change everyday union work. They failed to make member mobilization a permanent feature of union activity and to connect collective bargaining to the local's broader organizing agenda (Katz et al. 2003). In contrast, in the commercial division reforms succeeded at expanding the scope and the pace of member mobilization and fully integrating contract negotiations into the local's organizing program. Comparing these two sections clarifies what is needed to counteract the obstacles to union reform. It also illuminates the larger implications of incomplete or unfinished union reform vis-à-vis incumbents' position within the local.

The second question, in turn, deals with the potential disruptions caused by organizational reform in terms of members' trust in the union. Revitalization studies have only begun to address the potential pitfalls and negative consequences of dramatic organizational change in labor organizations (Waddington 2006). My dissertation contributes to this discussion by comparing the outcomes of organizational change in two sections of Local Z's commercial division, which I call the Northern Shore and the Southern Shore. In both sections reforms succeeded at intensifying mobilizing work and strengthening the links between collective bargaining and organizing campaigns. However, only in the Northern Shore section did organizational change achieve these goals without eroding members' trust in the union. Through this comparison, my research shows the unintended consequences of union reforms designed

to enhance organizing capacity. Such reforms could be counterproductive if they overlook members' views of union assistance and undermine reciprocity-based relationships between leaders and members.

Finally, the third goal of my dissertation is to contribute to the study of the outcomes of organizational change in voluntary organizations. I do this by addressing recurring dilemmas of reform processes. As Seo, Putnam, and Bartunek (2004) point out, all processes of planned organizational change expose tensions or contradictions between different facets of organizational life. While such contradictions are inevitable, reform processes tend to amplify them by focusing on certain dimensions of organizational structures and practices while ignoring others. Often the dimensions overlooked by reformers reemerge during the implementation of change in the form of unplanned consequences and "reverse effects" (Hood 1998). My dissertation addresses two types of contradictions: the tension between service and organizing, and the tension between formal structures and informal patterns. The first contradiction concerns the goals of union work—whether to emphasize strategic union building or immediate members' needs—whereas the second has to do with the best organizational ways to achieve them—whether to centralize, streamline, and standardize union work or to rely on informal relations and practical know-how.²

My data collection combined participant observation, in-depth interviews, and analysis of union documents. Even though I did not work for the union, I was able to take part in its formal and informal life and develop close relationships with informants. From the fall of 2000 to the summer of 2005, I was a regular participant in meetings of staff, activists, and the general membership. I also attended union conferences, training sessions, and meetings held in preparation for organizing, contract, and political campaigns. Furthermore, I accompanied union leaders to building visits and marched with leaders and activists in union rallies. Finally, I interviewed five top officers, twenty-three midlevel union leaders, and thirty-eight union activists.

In 2003, midway through my fieldwork, Local Z's officers introduced a set of reforms to "rationalize" union representation and transfer resources from service to organizing. I followed these reforms from their planning stages—through attendance at staff meetings and in-depth interviews with top officers—to their implementation and aftermath, when union officers themselves started to assess reform outcomes. My research approach paid attention to what union leaders and activists did beyond the formal definition of their roles; this strategy helped to illuminate how the union's system of representation and macro-organizing platforms got translated into microlevel processes, experiences, and relationships. Attention to these dimensions provided a deeper understanding of what changed and how with reforms, revealed the unintended

consequences of organizational change, and contributed to explaining reform successes and failures.

My research unveiled a dimension of organizing work so far neglected by supporters and critics of the organizing local approach. Admittedly, at Local Z organizing success was based, in part, on strong influence from the international union, centralization, and a top-down formulation of the organizing agenda. Such hierarchical features served to pool resources and coordinate strategies among union locals and, thus, helped to strengthen the union's bargaining power. However, organizing success also depended on a process of informal exchange that was neither dominated by the top nor acknowledged in officers' plans and ideology. As part of this exchange, union leaders would assist members with workplace disputes. Members, in turn, would participate in organizing, contract, and political campaigns. This exchange granted activists a much larger role than what critics would acknowledge. Activists were not merely pawns in top officers' organizing plans, with no other role than attendance at meetings and rallies. Activists helped leaders build, maintain, and expand the informal exchange of "help" that made member mobilization possible.

Furthermore, my research has revealed previously unstudied meanings of union participation in an organizing local. Contrary to the advocates of the organizing local approach (see Lerner 2003), my analysis showed that what motivated union members to participate went deeper and beyond a rational evaluation of the union's power and its capacity to improve workers' lives. Commercial janitors contributed their time and effort to the union not only because of expected gains but also because they felt *personally indebted* to union leaders and other activists. Residential workers, in turn, participated because they felt *morally obliged* to the previous and the next generations. Residential activists viewed their union participation in the context of a cycle of exchange connecting different generations. According to this conception, workers in the past had sacrificed themselves to secure career opportunities and a decent life for current workers; now it was up to current workers to do the same for their children.

What, then, can we learn from my case study regarding the paths to union revitalization? The most important contribution has to do with specifying what is necessary for successful union reform. The comparison between the residential division and the commercial division as a whole confirms Voss and Sherman's (2000) findings regarding the need of an external intervention, followed by leadership turnover, as a condition for successful reform. Such intervention is necessary to countervail external and internal inertial forces, including strong, long-term, institutionalized relationships with employers, entrenched leaders with no previous organizing training, and even, in some

cases—as happened in Local Z's residential division—no full awareness of the union's weakness.

My research also shows that, absent such external intervention, change in organizational structures is still possible, but there are limits to how far new structures can go in shaping actual behavior. In the residential division some union leaders—with a previous background in organizing—took it upon themselves to train and motivate activists and expand member mobilization in line with the goals of organizational reform. Other leaders, however, remained mostly concerned with service. Top officers, for their part, did not press for greater member mobilization outside of specific circumstances such as contract time and fight-back campaigns to regain previously unionized buildings. Furthermore, my research shows that changes in the union structure—when not preceded by the international union's intervention and leadership replacement—can actually contribute to reinforcing the position of service-oriented incumbents within the local.

The second comparison in my analysis—between the two sections of the commercial division—contributes to explaining potential disruptive effects of union reform. My analysis showed variations in the impact of reforms on members' trust in the union. In the Southern Shore section reforms privileged member mobilization and the organizing agenda at the expense of members' trust. In contrast, in the Northern Shore section reformers managed to bring day-to-day practices closer to the organizing local ideal without severely eroding members' trust in the union. My explanation of differential outcomes stresses the importance of the type of mobilizing campaigns launched in each section. In the Southern Shore reformers responded to what they saw as the most immediate threat and launched a series of "fight-back" campaigns to re-unionize sites that had recently turned non-union. In the Northern Shore, in contrast, reformers embarked on a campaign to combat increased workload in an attempt to reverse a long-term trend of deterioration of working conditions.

The type of mobilizing campaigns selected in each section affected reforms' impact on members' trust in the union. The obvious explanation for reforms' better outcomes in the Northern Shore is that, at least in the short term, Local Z had greater success with the workload fight than it did with the fight-back campaigns. However, more important than success itself—after all, the success of the workload campaign only affected a small minority of workers—was the role of the workload campaign in bringing reformers' vision of organizing power more in line with members' expectations of a strong union at the workplace. Unlike the fight-back campaigns, the workload campaign allowed reformers to connect the meaning and purpose of reforms to members' views of union assistance and union strength. By launching the workload campaign, reform-

ers managed to ground structural changes on workers' preexisting grievances (Kelman 2005).

In addition to contributing to the debate on union revitalization, my dissertation advances the study of the outcomes of organizational change in voluntary organizations. My findings reveal the existence of viable, albeit fragile, solutions to the tension between serving members' immediate needs and changing the status quo through organizing. I show how organizational actors can work to accommodate and reconcile opposite orientations (Seo, Putnam, and Bartunek 2004). Local Z leaders and activists accomplished this through the process of informal exchange linking union participation to assistance with workplace problems and through the union campaign against excessive workload, which combined immediate help to workers with a longer-term strategy to transform the market.³

In agreement with James Scott (1998), my analysis calls for formal structures that enhance, rather than disregard, informal processes and practical knowledge. My research warns against rationalizing strategies to centralize, streamline, and standardize union work. Based on Local Z's experience, I argue in favor of heeding midlevel leaders' and activists' views and acquired knowledge, maintaining the connections between member representation and mobilization work, and adjusting grievance-solving work to particular workplace conditions, legacies, and relationships.

Notes

1. I use fictitious names for the local, its sections, and the people mentioned in the study to protect research participants' confidentiality.
2. My formulation of the tension between service and organizing draws on Gordon (2005, 236) and Weil (2005, 344).
3. See Gordon (2005) for two somewhat similar formulas to "bridge" service and organizing tried less successfully by an immigrant workers' center.

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