

The Challenge Union Leaders Face When They Assume the Role of Managers Within a Labor Organization

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Abstract

Most union officers and staff directors have little or no formal training in human resources or managing workforces. The transition from labor leader or representative to manager that many union officials face when they assume responsibility for a union's staff is often a difficult and uncomfortable experience. This is in part because the experience of most union leaders has involved challenging management's decisions, not making them, and because union values often conflict with those of management. This paper will discuss this dynamic and suggest training and best practices that can help union officials make this transition.

Introduction

As the percentage of the workforce in unions in the United States declines and labor's power is challenged, scholars, labor educators, organizers, and others have been writing about and proposing strategies for revival and the need for change. The analysis and recommendations often include the need for transformational leaders with vision. Little, however, has been written about the supervisory and management skills union officials need to carry out whatever plans and programs they decide to pursue.

Visionary leaders with smart plans for preparing their unions to meet present and future challenges often find that progress is blocked by staff resistance. Among the complex web of reasons for resistance to organizational change are deficiencies in the human relations and labor relations policies and practices of the unions as employers. Included in this is a lack of accountability. Less productive staff are tolerated and the higher performers are rewarded with more work. There is often a lack of clarity about to whom staff were responsible. In some cases, the politics of the union makes staff so wary of displeasing the leadership that it leads them to be cautious at a time when the crisis in the labor movement needs bolder action and calculated risk taking.

Accountability is a problematic process within unions. While there is evidence that there is a significant amount of reluctance by union leaders to hold staff accountable, there are also efforts that are sometimes counterproductive. Some unions try to use quantitative measures such as the number of worksites visited. However, low-performing staff can easily thwart this attempt at accountability since there is often no qualitative component. One of those interviewed for this paper summed up the situation: "Some of the poor performers have been reps so long they know how to get over.."

Just knowing how many worksites were visited has limited value if there is no reliable way of knowing whether anything valuable was accomplished by them. At the same time, resentful over additional reporting requirements designed for low-performing co-workers, high-performing staff feel disrespected, less motivated, and more cynical.

In an effort to address some of the issues involving accountability and management within unions, Cornell ILR Labor Extension faculty, including the author, performed a needs assessment and designed and offered a four-day workshop called Supervising and Managing with Labor's Values, which was first offered

on November 20 and 21, 2008 and again on January 14 and 15, 2009. The experiences from that workshop inform this paper.

In addition, during the summer of 2010, supervised by Professor Lois Gray, (the author) and three ILR students—two seniors, Kirsten Bass and Edward Christian; and a sophomore, Alex Bores—conducted a study of union human resources and labor relations practices, which involved interviews, electronic surveys, and literature review.

After the completion of that study, interviews and surveys of former participants of the Cornell workshops revealed valuable insight into what type of training was helpful to officials in supervisory or management positions in their unions. From that research, we present in this paper a case study of “Union A,” which sent seven of its managers to the first Cornell public workshop and then sent the rest of its managers to later workshops.

What follows are the findings from the literature review, interviews, surveys, and evaluations mentioned above, suggestions of best practices and future training, and identification of issues for further study and investigation.

The Transition from Labor Activist to Manager

John T. Dunlop looked at “administrative, executive and leadership roles” within unions and famously described the process of union management as an “oxymoron” (Dunlop 1990).

Many union officials with responsibility to supervise and manage staff agree that doing so in a union is problematic and should be different from the management experienced by many of the union’s members. A union official with experience working for a number of unions expressed a strongly held conviction that “labor unions need a different vision of relationships between managers and supervisors and union staff and employees that ought to be a different model than corporate America.”

At the beginning of the first day of the Cornell workshop, “Supervising and Managing with Labor’s Values” participants are told, “When I say a word, please remember the first things that come to your mind. The word is ‘management.’” Nearly all the union leaders in the workshops have overwhelmingly responded with words like “evil,” “enemy,” “assholes,” and more unprintable responses. Upon further discussion, participants express how uncomfortable they are being managers or being accused of “acting just like management.”

In a confidential online survey sent to past participants of the workshop at least one year after completion, one of those surveyed when asked what was remembered from the workshops captured a common sentiment: “I remember the struggle I was going through between the reality of being a new supervisor in a unionized world in which ‘supervisors’ are deemed to be the enemy.”

In the interviews conducted during the summer of 2010, labor officials articulated the same aversion to being management as was expressed by the workshop participants. A former union official who now works as a labor educator said, “They are used to fighting bosses, so when it’s their turn to be a boss they want to be a good boss, but they may not necessarily know how and they have some reservations about whether it’s possible to be a good boss. The last thing they want to be is the people they are fighting.” A leader in a large union offered, “We spend the day fighting with management and sympathize with and defend members, so it’s uncomfortable to take on the role of those we oppose.”

While the above quotations capture the predominant sentiment heard in the interviews, it was not universal—and there are indications that things are changing. A consultant with past union staff experience who conducts workshops for union managers reported, “For years, I’ve said I know you don’t want to be bosses because we fight the boss, but unless you own your boss role, you can’t do it well.” In the past, participants nodded or laughed nervously in recognition. The consultant says things are different in some unions: “Now with unions that hire from the outside who don’t come through the ranks, they are very comfortable being bosses and look at me funny when I say it.”

One reason some union managers feel less discomfort than in the past may be because unions are hiring from the outside, but in some unions the difference is attributable to the tone set by the leadership. The chief of staff of a large union that hires from both inside and outside said, “We do a pretty good job of hiring and managing our directors.” At another large union with similar hiring practices, the chief of staff

indicated, “I make it clear in the interview process that being an efficient manager is something that the members expect and deserve from you—and if you are not ready to do that, this isn’t the job for you.” Some of the managers who reported to that chief of staff added that not only was he clear about what was expected, but he also set an example by being a good manager and being proud of it.

Still, even in unions where the managers accept their role, there is acknowledgement that the transition is not always easy. One union official assigned by the president to the human resources and labor relations functions of the union said, “At the senior level [of management within the union], they are very comfortable, but as we go down to lower level supervisors, the comfort level tends to be less.”

In summing up the importance of “owning” the management role, one supervisor in a union said, “I think if I thought of myself as a manager from the beginning, I would have made fewer mistakes.”

Lack of Management Experience and/or Training

An experienced union official who has worked for several unions said, “People are not born knowing how to be good managers, and the labor movement has placed little emphasis on getting good managers and training them.”

In addition, unionists are elevated to supervisory jobs for reasons other than their ability to manage, according to one of the interviewees who said, “Not much priority is placed on being a good manager. The qualities to move up don’t necessarily include being a competent manager. If people thought about it, they would say it is important. But charisma and strength are valued more.” Another interviewee remarked, “People move into management by being good at what they were doing before they got promoted, not because they want to be management or had training for it.”

In offering an explanation for why managers in unions do not get training, an interviewee commented, “Generally, there’s not a lot of training in the labor movement for the jobs people do anyway; generally speaking, it’s a craft you learn by doing, and that’s the culture.” Another union veteran said, “Most unions don’t train managers and if they do, they are mostly concerned with liability.”

Tom Nesbit studied training within unions in Canada and found that while there was a great deal of training for stewards and activists, unions expected their newly appointed full-time staff to be able to fully perform their jobs when hired. He also found that many elected officials don’t expect any additional training because, in the words of one regional union official, “You’d be admitting you don’t know something. You’ve run for this tough job in the union, and why would you think you could do it if you didn’t know everything?” (2002).

Lack of Accountability

One of the union officials interviewed who worked for multiple unions said, “I don’t think the evaluation systems and accountability systems are very strong in unions, and accountability is the part of supervising that union people have the most problem with. Unions have high tolerance for people who are not doing what they are supposed to.”

Of the unions interviewed, most have yearly evaluations or, in the words of several of those interviewed, they are “supposed” to have them annually. Only a few reported providing staff with continuous feedback, while one admitted giving feedback only “when someone does something wrong.”

The literature overwhelmingly criticizes yearly evaluations as ineffective, especially compared to a more ongoing system of feedback. Herbert Meyer, in “A Solution to the Performance Appraisal Feedback Enigma,” referring to “literally thousands of articles” about performance appraisals, said, “Most of these articles generally applaud the virtues of the performance appraisal and feedback process, lament their lack of success, then present suggested solutions to the program” (1991).

Audia and Locke (2003) affirm that supervisors in general shy away from holding employees accountable. They note that “research has shown that when people give negative feedback, evaluators regularly transmit ambiguous messages ... in order to make them more acceptable to the recipient.” The reluctance to give corrective feedback is particularly present in managers within unions who consider being compared to a boss as a cutting insult.

Much of the literature claims that the context for the appraisal is more determinative of results than techniques used by evaluators or the design of the appraisal tools. The focus on context, including the receptivity to feedback and attitudes about the legitimacy of the appraisal system, are especially relevant for unions since the very notion of performance appraisal makes some union representatives and organizers defensive and supervisors within unions uncomfortable.

Perhaps no one understands the vulnerabilities of performance appraisal systems better than full-time union representatives who regularly challenge them and defend those who feel unfairly evaluated. The advice union representatives give to members is to say as little as possible, don't admit any wrongdoing (at least initially), and let the representative do most of the talking. If those same representatives are being appraised by their union supervisor and they follow their own advice, then the resulting appraisal meeting is unlikely to be productive.

Without methods for fostering accountability, unions often tolerate low performers on staff. After reconfirming that everything said was confidential, one official shared that because of politics, "There are people here who are grossly incompetent, and there is no culture to do anything about mediocre performance."

Several of those interviewed identified internal politics as a significant impediment to greater accountability. One experienced union official captured that sentiment: "Because it [a union] is a democratic organization, those being supervised can use politics to influence those who supervise them. It's hard to set standards for people when they have access to the politics of the union." The front-line supervisors of one of the unions participating in a Cornell workshop designed for that particular union reported that they were severely hampered in keeping staff accountable because when they tried to do it, the person they supervise could "do an end run" to someone with more authority in the union to get the supervisor to back off.

One union official explained how politics affect staff performance in another way: "There is a culture in the labor movement that rewards loyalty more than anything else. A lot of people in labor are there because they helped those who got elected not, necessarily because of their skill or experience." A staff director for a union said that because of politics and the reluctance to act like management, "we say you have to be an idiot to lose this job."

Some representatives are elected themselves or have the right to run against the elected leadership, which gives them leverage to get their way and avoid being managed. On the other hand, hard-working and dedicated staff might find themselves hampered by nervous elected leaders who do not want them doing anything that might jeopardize the leader's position. If a staff person does what he or she thinks is right but it causes them to run afoul of the union's politics, that employee may find himself or herself in trouble despite doing a good job for the members. The president of a staff union representing those working for a large union indicated that one of the primary reasons the staff organized is to "insulate ourselves from the politics so we can do our jobs for members without regard for who has political connections or not."

Levy and Williams (2004) discussed the importance of an organization having a "feedback culture" in which giving and getting constructive feedback is accepted and valued. While they acknowledge that the research on this subject is not complete, they seem to expect that additional research will verify that the absence of a feedback culture negatively affects an organization's performance management efforts. While some unions are certainly striving to create positive feedback cultures, the atmosphere within many unions is mostly unfriendly to giving or receiving feedback due to the political nature of unions. A highly charged political environment is ripe for either not talking about setbacks and failures or for "blaming" to become the dominant method for dealing with bad news rather than constructive efforts to learn and do better in the future.

While mediocre staff are too frequently tolerated in the opinion of many of those interviewed, they also revealed that they have seen union leaders discipline staff through informal means, which induces staff to quit or retire. One union leader reported that for every staff person he hired, he has a resignation letter on file to be used when necessary. Other indirect means unions use to push out unwanted staff cited by those interviewed include reassigning someone to a location far from home, keeping them traveling, or assigning them to odious work or to a supervisor who rides them until they leave.

If these informal efforts to get rid of a poor performer fail, the union may keep the person on staff but in a role where they are isolated from the political life of the union or, in the words of one union staff person, “where they can do the least harm.”

Signs of Change and Improvement

A number of unions reported significant efforts to improve their “talent management” efforts. One chief of staff said, “Accountability is hardwired into our organization” and went on to explain in detail how it was part of an ambitious strategic plan for the union, which includes working with a consultant who “is helping us develop our own model of talent management.”

That union’s practices include “staff involved in planning the work, working the plan, and evaluating the results, a formal evaluation system focused on individuals’ development” and “defined objectives with a measure so we can evaluate by numbers combined with debriefings as a qualitative tool.”

This staff chief went on to say, “We believe it is key for us to remember that accountability has to be part of a value system that has to be shared by workers so they keep each other accountable rather than accountable to a manager, which sets up a dynamic we don’t like.” This was followed by a response to a question about what else the union needed: “The thing I’m interested in is how to evaluate talent in a way that is inspirational. We try to invent ways to recognize staff but I think we aren’t always as creative as we could be. ... We want to improve staff long-term satisfaction and retention, because it’s so tough to work for a union now.”

A labor lawyer representing union clients said, “Unions are going through great lengths to reorganize and restructure; more people are trying to ‘clean house’ and [renew] training initiatives and other ways to improve performance.”

Case Study: Union A

The chief of staff and six other supervisors at Union A attended the first public workshop, *Supervising and Managing with Labor’s Values*. They also sent additional supervisors to each of the three public workshops that followed within the subsequent two years.

The first public workshop came at the right time for Union A because, as part of their strategic planning, they concluded that they needed to improve their staff management skills. They were looking for a common framework and vocabulary to use as a group to fit management of staff into their overall plan. The chief of staff felt that “the workshop served as a useful introduction to ideas and ways of thinking about staff management that helped us start a discussion in our own union to do a better job.”

The chief of staff reported that as a result of attending the workshop, they were successful in “introducing and discussing the concept that supervision is an art in itself and there was knowledge and experience to be acquired as well as start a conversation on supervision using a common language.”

The chief went further to say, “With some supervisors, the mantle of being a supervisor sits well, and [with] others it’s still itchy. The common language, set of tools, and definition of the role helps them understand what’s expected of them. One supervisor left on good terms because, as a result of the training, she understood what was expected of a supervisor and she realized that her heart wasn’t into what her brain told her she had to do as a supervisor.”

When asked how they think the staff perceive what supervisors have been doing since the workshop, a supervisor replied, “Our staff may say we act more consciously and not accidentally supervising in ways that have changed the organization.” When supervisors at Union A address poor performance, they feel they have given that person every opportunity to improve and they can document the problems.

Union A has also begun to look more closely at its performance management as a system. At the workshop, they received a chart of the various parts of a performance management system, which they have posted in the office as an indication of how seriously they take it. The chief of staff said, “I took away from the workshop the system—I had it in my mind, but the workshop reinforced it.”

As a result of the system approach, Union A has “looked more at our hiring practices. When hiring and selecting staff, we are very clear what we want to achieve.” While hiring decisions in the past were made

primarily on the basis of the experience of applicants, more recently “we had two choices to hire—a more experienced person and a new graduate. We hired the new grad for attitude. ... We also look for organizational fit in hiring, so we hire people complementary to the rest of us.”

The management at Union A see themselves as “driving the organization forward, holding staff accountable, and thinking about their development. Our organization is moving in a different direction, and we are pushing staff to understand. We were thinking about it before the workshop, but it helped us sharpen our thinking.” Viewing their efforts at supervising and managing as part of a larger strategic focus for the union seems to be one of the reasons they have had success in implementing what they gained from attending the workshop.

As for additional training on supervision and management that Union A might find helpful, the reply was “additional training for the supervisor of supervisors and a refresher just for us to evaluate what we have been doing since the workshop.”

Recommendations

Supervisors and managers in unions must embrace their roles. Giving managers and supervisors within unions an opportunity to discuss their feelings about being a manager and encouraging them to affirm the value to the union if they become good supervisors and managers is effective in reducing their reticence to supervise and manage. Leaders need be clear with supervisors and managers in their unions about what is expected of them, and then those behaviors must be acknowledged and valued.

Supervisors and managers in unions need appropriate training. Training in management and supervision that is customized to the unique situations and needs of unions should be effective in helping managers and supervisors within unions to carry out their roles, especially in the area of performance evaluation. Key aspects of that training should include defining how to manage with labor’s values, emotional intelligence, management styles such as situational leadership, and a systems approach to performance management, as well as methods and skills for creating accountability.

Supervisors and managers in unions need support from their unions. In addition to the role definition and training mentioned above, union leaders must set an example by managing effectively with labor’s values. They must look at their entire system of performance management to make sure what they do is part of the union’s overall strategy and that all parts of the system are aligned. There also needs to be, to the extent possible, a muting of the influence of internal union politics on staff management. This includes having the union’s top leadership provide support and back up when managers and supervisors take reasonable actions.

For Further Study

There is evidence that a number of unions are making significant changes to their performance management systems. These efforts should be studied and analyzed over a significant period of time to determine their value and adaptability. Best practices, policies, and training for managing staff in unions should be studied and cataloged.

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