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## Reinventing an Organizing Union: Strategies for Change

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## Reinventing an Organizing Union: Strategies for Change

### Abstract

[Excerpt] Confronted by declining membership and market share as well as an erosion of bargaining strength and political influence, a sense of crisis now pervades many international unions. Some labor unions continue to adhere to programs and practices they have pursued for several decades. But others, faced with challenges so fundamental that their viability is at stake, have chosen to reexamine their basic policies and performance and to reorient their essential course.

This paper evaluates the experience of four such international unions, all of which have recently embarked on strategic planning initiatives. Three of the unions – the Electrical Workers (IBEW), Carpenters (UBC), and Painters (IBPAT) – operate primarily in the private sector, representing workers in the construction industry but serving significant branches in other industrial sectors as well. The fourth is a large public –sector union, the Government Employees (AFGE). The membership rolls range from about 100,000 members to more than 700,000 members.

### Keywords

strategic planning, union organizing, public sector, private sector

### Disciplines

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### Comments

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# Reinventing an Organizing Union: Strategies for Change

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Confronted by declining membership and market share as well as an erosion of bargaining strength and political influence, a sense of crisis now pervades many international unions. Some labor unions continue to adhere to programs and practices they have pursued for several decades. But others, faced with challenges so fundamental that their viability is at stake, have chosen to reexamine their basic policies and performance and to reorient their essential course.

This paper evaluates the experience of four such international unions, all of which have recently embarked on strategic planning initiatives. Three of the unions—the Electrical Workers (IBEW), Carpenters (UBC), and Painters (IBPAT)—operate primarily in the private sector, representing workers in the construction industry but serving significant branches in other industrial sectors as well. The fourth is a large public-sector union, the Government Employees (AFGE). The membership rolls range from about 100,000 members to more than 700,000 members.

All four unions believe that the difficulties they continuously encounter (1) at the bargaining table, (2) in administering their bargaining agreements, (3) during political lobbying, and (4) in all other functional areas of union affairs have a common root: a failure to sustain effective organizing and to expand their ranks. The common thread that ties together each of these strategic planning efforts is the professed goal all four unions share: to transform themselves into organizing unions. To attain success, they hope to establish as their primary mission organizing nonunion workers and to devote the necessary human and material resources to achieve that mission. Within these unions the service functions of collective bargaining, grievance handling, arbitration, legislative action, etc. have absorbed the lion's share of resources. Therefore, the values and beliefs that guide both individual and organizational behavior must change so that those leaders and members who engage in organizing are recognized and rewarded.

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Thus the process of reinventing an organizing union entails a strategic, structural, and cultural transformation.

In each of these initiatives, labor educators are working with union leaders to evaluate prevailing policies and organizing experience, to identify and overcome structural impediments to organizing success, to formulate and implement new organizing strategies, and to design and deliver training to help alter the organizational culture and provide new skills for leaders and staff. The observations offered here reflect our perspective and experience as labor educators.

### **Organizational Change Initiatives**

In each of these cases, the organizational change process was induced by a sense of crisis and driven by the determination of top leadership to revitalize their unions and recapture the passion and power their forebears enjoyed. To the extent the presidents of these unions have conveyed an unwavering commitment to change, organizational inertia and ambivalence have been challenged. The active and unambiguous support of strong leadership has helped set the stage for potentially dramatic organizational change.

These leaders have tried to engage in a previously unsanctioned level of organizational self-examination and criticism in order to share the hard facts of organizational crisis with unrestrained candor and to articulate a vision of a brighter organizational future. By clarifying their union's underlying principles and values and reaffirming their own commitment to organizing in every conceivable forum—in the union journal, speeches, meetings, conferences, memoranda, letters, even casual conversations—each of these leaders continues to play a central role in transforming his organization's culture.

For example, IBEW President Jack Barry closed his union's centennial convention with a speech devoted exclusively to organizing. In a self-critical spirit uncharacteristic of many union leaders, he told the IBEW's annual construction conference that policies of exclusionary membership and concessionary bargaining had been counterproductive and implementing organizing programs without first enlisting membership support and participation was mistaken.

### **Vision**

Because the institutional patterns of behavior in each of these unions are well established and generally oriented around servicing, the international presidents have had to project a vision in which the roles and responsibilities

of leaders and staff are redefined. The vision begins with a recognition that most of the union's leaders (from the local up through the international) have had little experience organizing; most of them inherited the union from past generations of organizers who built it. "For many years," argued IBEW President Barry, "we conducted the affairs of our union as if we were running a business. That approach may have made sense a generation ago. . . . But now, as we stand at the crossroads, our challenge is not to run a business but to build a movement. That means we must understand the essential difference between efficient management and effective leadership."

UBC President Sigurd Lucassen described his vision during a special conference for top leaders and staff: "We must rediscover the wisdom our founders grasped—organizing workers is the fundamental task upon which all others depend." Participants in the conference spent four days debating the vision and exploring how it could be realized.

In each of these unions, the top leaders have generated debate and dialogue about the need for a new vision of the future as well as the content of that vision. The vision has been presented first in broad strokes that articulate the union's core values and define its key goals; then through a process of public discourse it has acquired more clarity. IBPAT President A. L. Monroe has prepared a comprehensive vision document that he uses to guide his remarks in various forums. But clarity of vision is not sufficient; each of these unions is struggling to build deep and widespread consensus around that vision.

### **Building Consensus**

In an effort to attain the broadest possible ownership of the organizing vision, these unions have employed a range of methods to involve leaders and staff throughout the union. For example, the IBEW conducted extensive internal research, interviewing several hundred leaders in a variety of settings about their own experiences and ideas about how to improve the union's organizing effectiveness. The IBEW also created a steering committee to guide its efforts to become an organizing union. The UBC surveyed its international staff, giving participants an opportunity to critically examine the union's past and current policies and then issued a report that has influenced the union's basic direction. With the same purpose, the IBPAT surveyed a random sample of local leaders, staff, and international officers. The AFGE surveyed its staff and a random sample of locals regarding the effectiveness of its educational programs in promoting an organizing perspective. The AFGE also established a thirty-member organizing task force

with representation from all levels of the union to oversee a nationwide organizing initiative.

An apparently effective consensus-building technique is the "future search"-type conference. The IBEW organized a three-day vertically and horizontally integrated retreat for 40 participants to review the results of a year-long internal research effort and to make specific recommendations for the union's strategic organizing plan. These deliberations led to several major changes in the union's organizational structure and strategy. The UBC held two five-day staff and leadership conferences that began with a discussion of the union's vision and then focused on an organizing plan to realize that vision.

### **The Role of Labor Education**

Labor education has been instrumental in these efforts to achieve clarity and build consensus around the evolving organizing vision. Revising current education programs and designing new ones that reflect and reinforce the union's vision and values is a constructive way to generate support and momentum for organizing. All four of these unions either have utilized or plan to utilize a cadre of specially trained union instructors to deliver parallel programs to rank-and-file members nationwide that explain *why* the union must aggressively organize large numbers of new members in order to rebuild collective bargaining strength. These educational programs already have transformed the political climate in some local unions and have cultivated grassroots support for the union's organizing direction.

Beyond such broad educational initiatives, all four unions have carefully evaluated current training programs, discovering that a tendency to "compartmentalize" training atomizes union functions and obstructs the change process. These unions have attempted to revise and reintegrate *all* training programs around the union's organizing vision. For example, in the IBPAT the challenge of organizing (internally and externally) thematically ties together the week-long training for new local officers. The IBPAT is working with a select group of these local leaders, providing them with support and follow-up training; the objective is to make them effective change agents and models for others to emulate. The AFGE is replacing its basic stewards' training program with a new one for "activists" which focuses on organizing rather than servicing. All four of these unions are using innovative labor education programs to give leaders and staff new skills and knowledge so that they can play their newly defined roles successfully.

While determined leaders at the top of these unions may initiate or at least sanction the change process, pressure for meaningful and sustained

change often comes from the lower ranks of leaders, staff, and activists. Effective labor education programs help generate and maintain that kind of pressure. An expected side-benefit of these labor education programs emanates from the liberation pedagogy that underlies them. The spirit of these education programs is beginning to spread within the unions. As the educational programs become more participatory and as more local leaders and staff complete train-the-trainer programs and conduct training themselves, signs of this participatory approach are beginning to appear in other settings. For example, meetings and conferences appear to be a bit more interactive and inclusive as the circle of stakeholders expands. The culture of the union is thus altered in subtle but significant ways.

### Resistance to Change

The effort to reinvent an organizing union faces enormous obstacles in each of these unions. Well-established patterns of behavior that devalue organizing and/or rely on more traditional hierarchial structures and style are not easily dislodged and tend to continually reassert themselves. In at least one union the enthusiasm and momentum for change were subdued as top-down methods re-emerged. In another, a participatory strategic-planning effort to realign the union's structure to more effectively match resources with organizing and bargaining opportunities met with significant political opposition from elected international officers and ended in a stalemate.

The rhetoric of change is not new in any of these organizations, as international presidents have seldom championed the status quo over the past twenty years. So when leaders announce another initiative to transform the union, many leaders and staff respond with a predictable and perhaps healthy dose of skepticism. As it becomes apparent that the current effort is more ardent than in the past, leaders and staff who have become comfortable in their current roles feel threatened when routines are disrupted. This is quite understandable because the new organizing roles are often more demanding than the current servicing duties.

Also, after years of union stagnation and decline, a sense of hopelessness and despair may paralyze even those who support the *idea* of change and renewal. The change process demands a paradigm shift, and those who have grown accustomed to one way of seeing and doing things are reluctant to relinquish their worldview—with its affection for servicing over organizing—without overwhelming evidence that revitalizing the union's organizing efforts is both necessary and *possible*.

In order to overcome institutional cynicism and hopelessness, it is important that top leaders retain their focus on the organizing priority. In

one of the unions, attention of the international president was distracted from organizing initiatives by negotiations with a major employer to dramatically change the bargaining relationship. As the discussions progressed, staff involved in the organizing program were reassigned to committees working on the new labor-management system, in effect halting progress on the organizing front temporarily.

Interestingly, the democratic nature of unions may itself be an impediment to organizational change. Elected officials may be disinclined to direct limited resources and energy to organizing new members if the service to current members (their political constituency) might suffer. Several leaders have persuasively argued that if normal service is impaired by intensified organizing, the union's reputation among prospective members will be damaged and successful organizing will be undermined. That is why educational programs that reach current members and draw the connection between effective organizing and servicing are essential to the change process.

### **The Organizing Model of Unionism**

The apparent conflict between organizing and servicing is not easily resolved and has given rise to a spirited debate within the labor movement about an organizing model of unionism. The current servicing-model approach is built upon a transactional relationship between the union and its members. In exchange for dues, which members pay to the union as if paying a premium to an insurance company, the union provides a service: collective bargaining, grievance handling, arbitration, job referrals, etc. The loyalty and allegiance of the members depend upon the union's successful provision of these services. Each of these unions is exploring ways to activate and mobilize its ranks using an organizing model in which the union provides members with leadership and a vision and vehicle for self-realization. Rather than solving members' problems for them—the essence of the servicing model—the union transforms individual workers into a cohesive force to collectively solve problems.

Following this new model, problems are seen as issues around which prospective or current members are organized, and workers learn the essence of unionism by participating in and experiencing collective action. The organizing model envisions a union that behaves basically the same before and after certification. The only difference is that after certification the union has access to one additional tool: the collective bargaining agreement. In each of these four unions, discussions of this organizing model are being integrated into various training programs. The hope is that commitment to an organizing

model can lead to more cohesiveness in local unions, spark enthusiasm for external organizing activities, and help develop organizing skills.

### **The Union's Structural Fix Impulse**

While the organizing model represents one creative response to internal obstacles to change, there are other alternatives unions may be more likely to embrace. All four of these unions seemed eager to grasp for quick structural fixes to advance the change process. To be sure, both restructuring and a reallocation of resources are necessary in order to truly become an organizing union. And in three of these unions some restructuring has occurred.

In the IBEW a new position was created: an executive assistant to the international president responsible exclusively for organizing. Under his direction three branch organizing directors were appointed. Moreover, in each of the union's vice presidential districts, one or two organizing coordinators were selected. However, a recommendation to establish a permanent and representative national organizing committee in order to continue the work of the temporary steering committee and to oversee the union's organizing activities has not yet been implemented.

In the UBC, district organizing committees were formed to encourage the development and execution of regional organizing plans. Local, district council, and regional leaders were thus given greater responsibility and authority to organize. In addition, a major review and modification of the union's budgeting process was undertaken with the assistance of an outside consultant.

The IBPAT shifted resources by transferring 24 service representatives from its vice-presidential districts to a newly constituted national organizing staff and by allocating more than a million dollars to support organizing activities.

All of these structural adjustments may, in fact, help these organizations become organizing unions. But form should follow function. Modifications of the union's structure should be made to accommodate changing roles and responsibilities of leaders and staff. Sometimes these structural changes mask underlying problems that may ultimately subvert the change process. For example, if the top leadership is irresolute about transforming the union's culture and pursuing an organizing vision around which consensus is built, it may be foolhardy to think that organizational behavior will be fundamentally altered by creating new positions in the structure.

Furthermore, new structures will mean little if the staff assigned to organizing positions are merely shifted around without changing their values,

beliefs, skills, and goals. On a related issue, one union has implemented a series of structural changes but has made little progress in recruiting new organizing staff who match the women and minorities dominating the work force in nonunion organizing targets in the union's manufacturing jurisdiction.

On the other hand, *changed people and/or new staff* may be able to achieve a great deal even within the constraints of the old structure. For real organizational change to occur, unions will have to develop better personnel policies so that they can identify and cultivate new leaders, define changing roles and performance indicators with greater clarity, provide leaders and staff with the training and support they need to fulfill their new roles, and conduct meaningful performance appraisals.

### **Achieving Success: Support the Innovators and Mobilize the Ranks**

We are convinced that as the leadership defines an organizing vision and as the union initiates a broad educational process to alter its culture, two additional factors can help carry the change process toward success. First, the union must support those innovators who struggle to give the union's organizing vision concrete meaning in the real world. Second, the union must mobilize the active support and participation of the rank-and-file membership.

In many unions including these four, a greater premium is sometimes placed on political loyalty than on principle or performance. There tends to be a mild obsession with protocol and a fear of even appearing to rock the boat. But when creative leaders at the periphery experiment with ways to apply the union's new vision to the circumstances they face in the field, the broadly sketched vision begins to become a reality. To give license to those innovators who have embraced the organizing vision and wish to bring it to life, the top leadership in several of these unions has recently departed from accustomed practice and begun to encourage reasonable risk taking as well as widespread networking among activists across traditional organizational lines. As the innovators experience some measure of success (for example, applying the organizing model of unionism to the conduct of local union affairs or implementing particularly creative and effective external organizing strategies), the top leaders should recognize and honor their efforts. By highlighting and rewarding successful change, the leaders can urge others to replicate those successes and promote the dissemination of an organizing focus throughout the union.

The final arbiter of organizational change in a labor union is the membership. Without rank-and-file support, even the most determined leaders

will succumb to the political will of their constituency. Without membership participation, even the most energetic change agents will exhaust their stamina. To their credit, these four unions are pursuing ambitious membership mobilization initiatives. They are implementing educational programs that are being brought directly to their rank-and-file members by union trainers from the local, district, and international offices.

The IBEW developed the Construction Organizing Membership Education Training (COMET) and trained more than 600 instructors who have delivered the program to more than 20,000 members. It followed up with the Membership Education and Mobilization for Organizing (MEMO) course for membership in its manufacturing, telecommunications, utility, and broadcasting branches. The UBCJA and IBPAT customized the COMET for their respective unions and plan to train more than 100,000 members over the next year.

In the case of the IBPAT, the entire leadership of the international union participated in an intensive train-the-trainer course so that even vice presidents could deliver the union's organizing message among rank-and-filers. In the AFGE, current plans call for the new activist program, which is replacing stewards' training, to be delivered throughout the union by members of the organizing staff to ensure that the organizing focus is retained. AFGE President John Sturdivant has emphasized to his staff that a holistic approach is necessary, tying organizing to all of the union's other functions.

So far, members have greeted these programs enthusiastically. In addition to inspiring the membership to support the union's organizing mission, the training is bridging the proverbial gap between leaders and led, mitigating the suspicion that many rank-and-filers have of the international office as a distant and mysterious body. As a result, these unions are beginning to enjoy a greater unity of purpose than they have experienced in many generations.

## **Conclusion**

Reinventing an organizing union is a daunting task. With a unifying vision, strong leadership, broad ownership, and well-conceived educational programs, these unions may be on the verge of achieving a substantive cultural, structural, and strategic transfiguration. A reallocation of resources and a restructuring of the union accompany these initiatives, but an affection for quick structural fixes to longstanding problems will likely hinder rather than help the change process. While visionary leaders at the top of the organization are essential, there is a limit to what they can accomplish.

In fact, the rubber meets the road out in the field where innovative risk takers, determined activists, and rank-and-file members will ultimately decide if these organizations truly become organizing unions.