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Abstract
[Excerpt] Management is a function, as well as a class of people. In this article, network member Ken Margolies discusses the management function within unions. It's a subject he knows pretty well, having written a thesis about it. However, despite some great work by Ken and others, we are still a long way from a union theory of management. We know that command-and-control leads to endless problems, but we are still scratching our heads over what to do instead. Perhaps one place we could start is within our own organisations – labor unions. It seems unlikely that we can meet the challenges ahead unless learn manage ourselves (and others) better.

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Managing Union Management

By Ken Margolies

Management is a function, as well as a class of people. In this article, network member ***Ken Margolies*** *discusses the management function within unions. It's a subject he knows pretty well, having written a thesis about it. However, despite some great work by Ken and others, we are still a long way from a union theory of management. We know that command-and-control leads to endless problems, but we are still scratching our heads over what to do* ***instead****. Perhaps one place we could start is within our own organisations – labor unions. It seems unlikely that we can meet the challenges ahead unless learn manage ourselves (and others) better.*

Can unions meet the challenges ahead without being better managers?

If managing is working with and through people to get things done, then unionists need to become good managers. But ask nearly anyone in the labor movement how well unions manage staff and you will probably get mostly negative answers — once they stop coughing nervously.

Unionists who find themselves responsible for supervising and managing their union's staff are not only often unprepared, skill-wise, but they also have a strong aversion to being managers. As a result, staff get inadequate direction when they need it and sometimes too much direction when they don't. Feedback is erratic and only reluctantly given, until the union managers get fed up — at which point they emulate the bosses they criticize and make a mess of it.

When I conduct training for union-managers through Cornell University, I begin by asking participants to state what comes to mind when I say, "*management*." Countless times their responses include words like "*evil*," "*enemy*," "*assholes*" and more explicit descriptors. In further discussion, participants express how uncomfortable they are being managers.

Managers in unions often view their supervisory duties as "*extra*" work that pulls them away from what they like and at which they excel, such as bargaining or campaigning. A general counsel of a union had a small epiphany when he realized that he loved handling cases but hated supervising others doing that job. One manager, after attending the Cornell workshop, decided to request a different job within her union because she realized managing was not for her.

This may not be surprising considering that unionists are typically elevated to supervisory jobs for reasons other than their ability to manage. According to one leader of a union, *"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."*

While the negative view of being a manager was most common, there are union managers who accept their role. The chief of staff of a large union told me, *"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."* One of the supervisors in that union said*, "The chief of staff is very clear that my job is to be a manager. Those managers with problems are the ones who have trouble getting past personal feelings."*

However, even in this local some of the supervisors expressed ambivalence, *"I had to fire someone and it hurt me to have to put them out of a job, but on the other hand they were not performing, which is a disservice to the members."*

In summing up the importance of "owning" the management role, one manager from a union noted*, "If I thought of myself as a manager from the beginning I would have made fewer mistakes."*

It's about a system, not a form

When unions decide to try to hold staff more accountable they usually start by looking for the right performance appraisal form. This leads to a mechanical procedure focused on "*rating*" performance rather than efforts to help staff develop. Boiling their performance management down to an annual review meeting where staff are rated on a standard form is a mistake that unions, as well as many other organizations, repeatedly make.

A much more effective alternative is developing a culture of continuous feedback — both positive and corrective. Few organizations, and no unions that I know of, have created such a culture. This is likely due not only to a reluctance to give feedback, time pressures, and other organizational and cultural obstacles, but also because performance management is viewed as an event rather than as a system. A performance management system looks at how organizations set goals and expectations and how they hire, select, orient, train and develop staff. It includes how staff are treated and how disputes are handled, what is rewarded and punished, and other structural and cultural dynamics.

When parts of the system conflict it impedes the union from carrying out its strategies. For example, many union leaders tell staff to spend time and effort identifying and developing rank and file leaders. Sometimes this is reinforced by training for staff on how to identify and work with activists who can address issues previously handled by the staff. However, many unions measure and give positive recognition to those staff who bring in the most political fund donation cards, fill busses for rallies, or turn out members for events regardless of how they get it done. Staff who do not reach their numerical goals in the short run because they are developing rank and file leaders are criticized, while staff who hustle and collect cards themselves are the heroes.

While training is part of the system that should be aligned with the union's strategies, some labor educators report that many unions view training in isolation. Few unions make training plans to coincide with upcoming priorities like contract negotiations or other campaigns. On the other hand, when union leaders encounter difficulties achieving their goals they may provide training to staff when,

in fact, the solutions they need also require structural and cultural changes. For example, one union tried to improve staff performance by devoting significant resources to training their managers. However, the efforts stalled when it became clear that whenever a supervisor tried to hold staff accountable they could often go to someone with more authority who would tell the supervisor to back off.

Unions seeking a quick fix rather than a more systematic approach to holding staff accountable and improving members' view of the union may track measures such as the number of worksites visited by staff. Representatives in one union who were required to report these metrics revealed that low-performing staff were easily thwarting the effort since there was no qualitative component. As a result, union leaders knew how many work site visits were made but had no way of knowing whether anything valuable was accomplished. One union supervisor summed up the situation, "*Some of the poor performers have been reps so long they know how to get over."* At the same time, high-performing staff who might make fewer but better visits become cynical because they feel mistrusted, second-guessed and resentful of the extra paper work.

In some cases unions end up with low-performing staff because they hire the wrong people. In recruiting and selecting staff it is common for unions to look primarily for dedication to the cause, loyalty and the ability to inspire members. Factors such as emotional intelligence, writing ability, experience outside the labor movement, whether the candidate is a good fit for the team and job, and an ability to grow and develop into more responsible positions with the union often are overlooked.

Unions not satisfied with how they manage staff performance

A union official who has 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."*

After confirming that all comments were totally anonymous, 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. There are some high performers, but over all I'm not very satisfied with the performance of the staff."*

Another union representative was even blunter about how tolerant the union is of marginal performance, *"We say you have to be an idiot to lose this job."*

According to the HR director of a large union, one result of tolerating poor performance is that some union leaders and managers eventually explode and demonstrate the most egregious behaviors of the worst bosses, demanding that the staff person be fired or disciplined without any documentation or progressive discipline.

Instead of utilizing the kinds of procedures unions demand employers use, some union leaders use informal means to induce unwanted staff to quit or retire. One union leader reported that for every

staff person hired there is a resignation letter on file to be used if necessary. If informal efforts fail, the union may put a person in a role *"where they can do the least harm."* Besides being a poor use of union resources, doing this undermines the morale of high-performing staff whose main reward for doing well is more work while little is demanded of the lower performers.

Politics

Several union leaders agreed with a statement made by an experienced union official, *"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."* Another leader added, "*Union staff tend to excel based on loyalty rather than job skill."* A manager from a large union reported that*, "I busted a staffer who was sleeping around and falsifying records, so he organized members to picket the union office."*

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 staff do what they think is right but it causes them to run afoul of the union's politics, they may find themselves in trouble despite doing a good job for the members. The president of a staff union indicated that one of the primary reasons the staff organized was to "*insulate ourselves from the politics so we can do our jobs for members without regard for who has political connections or not*."

Supervising skilled anti-authoritians

Perhaps no one understands the vulnerabilities of performance appraisal systems better than full time union representatives who regularly challenge them on behalf of members who feel unfairly evaluated. Union representatives advise members to say as little as possible, don't admit any wrong doing (at least initially), and get a representative to do most of the talking, if possible. 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.

Combining anti-authoritarian staff skilled at protecting members from potentially harmful evaluations with managers reluctant to conduct evaluations within a superficial performance management system is a recipe for a very dysfunctional process. Based on interviews with both union representatives and managers within unions, what follows describes common types of behaviors exhibited at annual performance review meetings.

Reluctant and/or unskilled evaluators fail to provide clear feedback, instead hinting at issues or qualifying corrective action. Staff leave the meeting either confused or confident that they got a good evaluation without picking up on the suggestions for improvement.

Supervisors eager to get through an unpleasant meeting who have a negative view of an employee's performance may clumsily lay out harsh criticisms without demonstrating full knowledge of

the person's work. Staff then go into defensive/offensive mode and may attack the evaluation process and challenge the supervisor's knowledge of the work or qualifications to evaluate it or invoke the ultimate insult, "*you are just like the management we fight*."

Other staff strategies include blaming alleged unsatisfactory results on external factors, of which there are many. They are careful about what they say and may demand that the supervisor justify any negative ratings. Faced with these tactics supervisors may either shift to giving positive feedback to get off the hook or react in anger and counter with accusations and harsh criticism.

Supervisors who decide that the staffer will not heed corrective feedback or those who lack the skill to effectively counsel employees may do exactly what they are being accused of—act like the management the union opposes on behalf of their members. In those cases they use the performance appraisal to create a paper trail that can be used against staff in the future. When the supervisor is in this mode and the union representative is in defensive mode the appraisal meeting becomes like a chess game, with both sides choosing their words carefully and trying to out-maneuver the other while establishing a record of the meeting favorable to their position. This obviously prevents a productive discussion of what the staff person does well and could do better.

Encouraging signs

For unions to have successful HR and labor relations strategies regarding staff development and accountability, they need to practice better alternatives than either neglect or the too common dysfunctions described above. They need to take a systematic approach to performance management. Fortunately, there are encouraging signs and best practices from which to learn.

One chief of staff said, *"Accountability is hardwired into our organization"* and went on to explain in detail how this was part of an ambitious strategic plan for the union that 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 to them so we can evaluate by numbers combined with a culture of debriefings as 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 which 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."* She went on to say, *"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 at that as we could be. We want to improve staff satisfaction and retention, because it's so tough to work for a union now."*

The chief of staff at a different union said that he and his other managers 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*."

At another union the managers worked with a facilitator to analyze their performance management system and found that their inability to be more effective was causing high turnover and short-staffing. Consequently, they assigned a manager to work on recruitment and retained a "headhunter." They found that the high turnover was due to personal/family situations; they will look more closely at whether the way they select staff needs to be changed.

Officers at a large union hired a new director with experience aligning HR and labor relations (HR/LR) strategies with the goals of an organization. He found high staff turnover, that the union was often hiring the wrong people, and that many managers were unable or unwilling to do their job well. The new director put considerable time and resources into training of management staff, which also included an explanation of the union's expectations of them and a presentation of the union's new HR/LR policies. These included different approaches to hiring criteria, more staff training, and other measures to reduce turnover.

A union whose managers attended Cornell training and decided to think more systematically reported that as a result of taking a broader view of who they hire, "*We put much more emphasis on hiring people complementary to the rest of us.*"

A labor lawyer representing union clients said, "*Unions are going through great lengths to re-organize and re-structure, more people are trying to 'clean house' and renewing training initiatives and other ways to and improve performance.*"

A person assigned to HR functions in her union made the point few unions of a similar size had anyone with those duties and concluded, "*It's an indication of the vision of the president of our union that he saw fit to put such emphasis on making sure the staff were treated well and held accountable.*"

A union official with experience working for a number of unions hit the nail on the head when he said, "*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*".

The quotations from union leaders and staff contained in this article are from interviews performed by the author and by Cornell School of Industrial and Labor Relations students, Kirsten Bass, Alex Bores and Edward Christian, supervised by the author and Cornell Professor Emerita, Lois Gray as well as electronic surveys conducted from 2009 – 2011. This article is a version of a much longer Master's Thesis on the subject the author produced for a Master's In Professional Studies from Cornell University. The thesis, "Human Resource Strategy for Labor Unions: Oxymoron, Chimera or Contributor to Revival" (MS #1003), is accessible here: http://digitalcommons.ilr.cornell.edu/monograph/4