

**Union Leadership Development in the 1990s and Beyond:  
A Report with Recommendations**

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**92-05**

**June 1992**

A discussion paper prepared for the Center for Science and International Affairs, Harman Fellowship Program in the Science, Technology and Public Policy Center, John F. Kennedy School of Government, Harvard University.

Author's Note: This paper represents a working draft of work-in-progress. Please do not quote without consulting the author. I have benefited from prior readings and suggestions from Rose Batt, Harvey Brooks, Thomas Kochan, Michael Maccoby, and Hal Stack. Comments and suggestions are welcome.

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This paper may be cited as: Susan C. Eaton, Radcliffe College and Harvard University. "Union Leadership Development in the 1990s and Beyond." CSIA Discussion Paper 92-05, Kennedy School of Government, Harvard University, June 1992.

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# **Union Leadership in the 1990s and Beyond**

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# Union Leadership Development in the 1990s and Beyond

Susan C. Eaton

## Executive Summary

This paper argues that a new approach to leadership, a stronger and more clearly articulated moral vision, and a recommitment to organizing the unorganized are essential to the future of trade unions in the United States. Only with these three changes can unions live up to their potential to enhance all human development as well as represent the concerns of working people in dealing with the power of managers. Unions are inherently complex political organizations, which must articulate and defend both the self-interests of workers and of unions as institutions, as well as understand and promote the well-being of the work product their members are creating and the society in which they live. At their best, they combine enlightened self-interest with a genuine selflessness and concern for the common good.

Union leaders are elected democratically. They must at once respond to their membership base and simultaneously lead their members to see beyond their own interests to the concerns of those who are not members but may be, and whose well-being affects both the members and the society. They must ensure that the union provides a quality service to its "customers," the members, at the same time as they must provide political and social interpretations of events which motivate their followers to act collectively in an individualistic culture, and to care about others in a selfish culture. They must exert both charismatic and bureaucratic leadership, which, as Max Weber recognized, is an immense challenge. They must be both entrepreneurial and consolidating. In addition, they usually have fewer personal and institutional resources to work with than many new business leaders because of their working-class backgrounds and training as well as the limited and constrained role of labor in US society, even before its current "under-siege" state.

This paper begins with a definition of leadership embedded in a brief literature review. It then presents an overview of the organizational and political context for union leadership development at five levels ranging from the workplace to the national office. The major substantive section presents a five-stage theory of leadership development experience which argues that early work experience is the most significant in defining future leadership actions. It concludes with a short case study of leadership development in the context of a new, unusual local union which suggests a future potential model for unions generally, the Harvard Union of Clerical and Technical Workers (HUCTW). Throughout, the paper focuses on the growing unions in the public and service sectors which are the most likely to influence the future direction of the labor movement in this country, and addresses gender and cultural issues in leadership. The appendices address methodology issues, some background statistics on the US and Canada, and specific program recommendations.

While this is a small portion of what will eventually be a larger work, it is my hope to make a contribution to the critical issues of future leadership among working people in the US, especially among those who will make up the majority of Workforce 2000. The paper assumes that unions, as collective voices of workers in this country, can play a vital role if they are willing to challenge their own institutional assumptions in the interests of innovation and inclusion and to realize their often unspoken moral vision.

- Susan Eaton, May 1992.

## Union Leadership in the 1990s and Beyond

### Preface

This paper summarizes research and thinking I have done this year on my leave of absence from the Service Employees International Union staff. In my twelve years of work with SEIU, I have been responsible for organizing, bargaining with, and training hundreds of rank and file leaders throughout the country. I also have trained, learned from, and worked with local union officers and executive board members, and staffed national-level SEIU Advisory Committees on Women's Programs and Civil and Human Rights.

I do not address this topic lightly; it is one of the most difficult issues confronting the labor movement today. I write about union leadership with great respect for many union leaders who have some of the most challenging responsibilities, with the least honor or recognition, of any democratic leaders in our country. I hope that what is contained here will be helpful, but it is only a small part of thinking about a transforming labor movement in the US which has the potential for a positive impact on human development here and around the world.

With the invaluable support of the Bunting Institute and Radcliffe College, the Harman Fellowship at Harvard's Center for Science and International Affairs in the John F. Kennedy School of Government, the George Meany Center for Labor Studies, and the Scanlan Funds at MIT's Sloan School, I have had the opportunity to read widely in the field of leadership, gender studies, and labor history; to conduct interviews and surveys; and to talk with many people about this issue of future leadership development for the labor movement. I have benefited from the intellectual support and previous readings of this paper of Hal Stack, Tom Kochan, Michael Maccoby, Harvey Brooks, and Rose Batt. I also wish to thank my Radcliffe undergraduate research partners Wynn Huang and Angeliki Contis. This research would not have been possible without the participation and openness of dozens of union leaders and staff who gave generously of their time and insights. My husband Marshall Ganz has been a supportive and challenging critic and friend.. I welcome comments and suggestions on improving this paper.

Susan C. Eaton  
Cambridge, Mass.  
May 1992

# Union Leadership Development in the 1990s and Beyond

Susan C. Eaton\*

May 1992

We of the CIO are proud of this American quest for liberty and the struggle for equality... We seek, today, to implement this great heritage. We are dedicated to the responsibility for furthering economic opportunity, religious freedom, and political participation... In the achievement of this task, we turn to the people because we have faith in them...<sup>1</sup>

-CIO Constitution, 1938

...Calling upon all who believe in securing 'the greatest good to the greatest number, to join and assist us, we declare to the world that our aims are: (1) To make industrial and moral worth, not wealth, the true standard of individual and National greatness; (2) to secure to the workers the full enjoyment of the wealth they create, sufficient leisure in which to develop their intellectual, moral, and social faculties; all of the benefits, recreation and pleasures of association ...<sup>2</sup>

- Knights of Labor Constitution, 1907

Union leadership is fundamentally moral leadership. If leaders do not constantly articulate and act according to labor's core values and vision of social and economic justice, inclusion, human development, and hope, they have little chance of successfully mobilizing their members over the long term purely on behalf of economic self-interest. Rather, they will be vulnerable to recrimination at any economic downturn or poor contract settlement. More significantly, labor's leaders must constantly strive to organize new workers in order to broaden the base, bring in new leaders, and fulfill the mission of the union movement. Since leaders are elected by current dues

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paying members, not the unorganized, the fundamental values of labor must be clearly and consciously shared by leaders and followers in order for the scarce resources of current members to be devoted to organizing new workers, and to supporting the new leaders who emerge in these struggles.

*This paper will argue that current leaders need to carry out a virtual revolution in articulating labor's values and vision, increasing organizing, and consciously developing new leaders for the future in order to ensure labor's very survival. and the realization of its goals.* While most unions are struggling just to train new leaders to replicate and run organizations of the past, the times today demand new leaders who have vision and talent well beyond that required of their corporate counterparts. It is up to the labor leaders of today, at every level, to rise to this challenge and to recreate a movement which can contribute to the development of every person's full potential.

The paper will begin with a discussion of the meaning of leadership, arguing that the time for transactional leadership is past and the need for transformational, empowering leadership is urgent. Then it will present an brief overview of the historical, organizational, and political context for union leadership development at five levels-- from the workplace to the national union-and how this context has changed over the last 30 years. The focus will be on the growing unions in the public and service sectors of the economy because they are the most likely to have the resources, the motivation, and the opportunity to invest in future leadership development. Next it will propose a five-stage theory of leadership development experience within a union, suggesting potential positive influences at each stage (entry, orientation, training, work experience, and leading) and arguing that the earliest experiences are often the most important. Finally it will present a case study of leadership development in the Harvard Union of Clerical and Technical Workers, documenting a new and creative model which demonstrates the most innovative approaches and their potential. Throughout, attention will be focused on gender and cultural issues in leadership. Appendices address methodology issues and specific program recommendations.

What creates excellence in union leaders ? In a time of dramatic decline in union membership and influence, what kind of people decide to devote their lives to trying to strengthen the rights of workers? What kind of leadership is necessary to reverse labor's decline, and to build a climate of innovation, creativity, and social justice which will mobilize members and the public in support of labor's social and economic goals? What kind of training or development programs could possibly prepare today's and tomorrow's generation of union leaders for the challenges ahead? How can top union leaders, who are overwhelmingly white men, come to represent more fully the life experiences of the 18.8 million workers they represent, who are nearly 40% women and 22% men and women of color? <sup>3</sup> And under what circumstances, if any, is the present dearth of visionary, future-oriented union leaders likely to change?

These are questions this paper will seek to address, based on a year-long research project involving dozens of grassroots and mid-level union leaders, particularly women and minorities, some of whom hope to become tomorrow's leaders. It concludes with recommendations for what can be done by those unions which wish to undertake the difficult but essential task of creating a new leadership base. Of course the study must be placed in a context of the place of unions in American society and the pressures and constraints on them. While space limitations prevent a thorough analysis of that topic here, there are excellent resources to consult on it. <sup>4</sup>

The themes suggested here include the following: first, most people learn best through guided experience. Formal training has a valuable but limited role in determining what most union leaders do and learn. It can teach tactics and, at higher levels, strategy. It can abstract and synthesize the lessons of daily experience. It can reinforce community culture and values, and articulate goals. It can create a sense of community, solidarity, and teamwork. It is an important part of any leadership program.

But workers and leaders gain their beliefs about the world through their daily work and life experiences. And too often, formal training is dissonant with their lived experience. This creates cynicism about the training and makes it ineffective. At least in the area of union leadership, much experience can be planned and guided. The emphasis in existing union education and leadership



development programs is most often on the formal training-- not the informal or guided experience. Ironically, this strategy effectively neglects the most powerful learning experiences most people have. This paradox is at the heart of labor's leadership dilemma.

A second theme is that unions need to broaden their ideas of leadership a great deal. Most unions could increase their leadership roles and opportunities exponentially without having an "overabundance of leaders." Many unions have settled into a fairly conventional notion of leadership as control, discipline, and direction, particularly in declining and defensive organizations. It is as if the few times, such as during a strike, when discipline and direction are desperately needed, have become the basis for all the leadership models; or possibly as if unions have adopted a traditional "management" notion of leadership. But there are alternate leadership models gaining strength in the world of feminism, civil rights, and even progressive business. These are models which I will call "collaborative participatory" models. They are based on the relationship between leader and follower being a transformative and empowering experience for both. Third, union leadership must be more inclusive. It is no longer viable to have a vision of leadership which is only male or only European-American. Union culture must welcome diversity and celebrate differences in leadership styles which are rooted in different life experiences. It can be an exhilarating, if unsettling, experience to do so.

All of these changes will not come without attendant risk. For current union leaders to create and support programs for new leadership development at a time when there are extremely pressing demands on their time will be a difficult and courageous choice. It often means challenging politics as usual. Yet there are leaders at every level who can contribute to revitalizing their own unions and to organizing new members. Fortunately, organizing new members and developing new leaders go hand in hand. Organizing new immigrants, service workers, and unorganized professionals as well as white-collar and unorganized blue-collar workers will bring unions closer to realizing their vision and values and simultaneously generate new leaders for the future. What is required is innovation, creativity, courage and boldness on the part of current leaders-- to set a new union culture and program for leadership development and organizing into

motion. This paper is one effort to stimulate debate and action which will contribute to the realization of labor's goals and values.

## PART ONE: LEADERSHIP DEFINED

"Most human talent is undeveloped."

-- John Gardner <sup>5</sup>

There are many definitions of leadership. Important twentieth- century American historical notions of leadership include the 'great man theory,' which postulated that leaders were born, not made-- and in conjunction with their historical time, they would rise to greatness with some inevitability. Next, there was a theory of leadership "traits," which was adopted by academics who studied many cohorts of leaders and defined their common traits. They used such measures as dominance, charisma, aggression, vision, and even masculinity. <sup>6</sup> After a study of all the trait studies showed that there were no consistently reliable measures, social scientists advanced a theory of "behavioral leadership." They argued that leaders could be identified because they engaged in certain behavior, such as controlling, planning, directing, deciding, and motivating. In the 1970s, this theory was largely discarded in favor of a newer notion of "situational leadership," which suggested that whatever a leader's traits or behaviors, the critical element of his or her leadership effectiveness was whether he or she used the right ones in the right circumstances. Some employees needed to be treated in an authoritarian manner, while others required a more participatory and respectful approach, for example.

Most of these theories of leadership were articulated in the context of political leadership, often drawing on presidents and heads of state, or corporate leadership, studying top managers and chief executives with the goal of distinguishing managers from leaders. They shared a notion of

the leader as an isolated individual with certain qualities, and they varied in whether they believed these particular qualities could be developed or not. Few if any of them studied women leaders or persons of color. One exception is Michael Maccoby's 1981 book The Leader, which included a union leader, a woman public sector manager, and a black foreman among its examples of leaders! This breadth, in part, enabled him to identify important moral qualities including a respect for human development and a willingness to share power among the leaders he profiled. More recently, Peter Drucker and Judy Rosener have lauded non-profit management and the ways women managers lead, suggesting that women often have a more cooperative, inclusive, and flexible approach to management.<sup>8</sup>

For purposes of understanding union leadership, few of these studies were helpful. To be sure, some union leaders went through management training courses and learned about Maslow's Hierarchy of Needs and took the Myers-Briggs Type Indicator (MBTI) tests, but they were very few. The leadership studies themselves usually did not include leaders of social change movements, or locally-elected political leaders of organizations.

There were a few alternate models of leadership based in real social change experience which have had an influence on union leaders. For example, Ella Baker, a longtime civil rights organizer, taught the young organizers of the Student Nonviolent Coordinating Committee (SNCC) about developing leadership among the people one was organizing and letting them make the critical decisions about their lives. "Instead of the leader, a person who was supposed to be a magic man," she said, concerned about an overdependence on the charismatic leader Martin Luther King, Jr., "you would develop individuals who were bound together by a concept that provided an opportunity to grow into being responsible... [the movement] must provide a sense of achievement and recognition for many people, particularly local leadership,"<sup>9</sup> Similarly, Cesar Chavez was learning in the 1950s and 1960s the lessons of community organizers Saul Alinsky and Fred Ross that "...[you] help people by making them responsible."<sup>10</sup>

In 1976, James McGregor Burns made a major contribution to the field with his book Leadership.<sup>11</sup> He argued that leadership was in fact a relationship between leader and follower,

in which all parties benefited. It is followers who create leaders, not anyone else. He noted that traditional leadership was "transactional," consisting of an exchange of value-- like a vote for a promise of a job, or a clean street. He also described a kind of leadership he called "transformational," which he said occurs "when one or more persons engages with others in such a way that leaders and followers raise one another to higher levels of motivation and morality." <sup>12</sup> He cited India's great political and religious leader Ghandi as an example.

This understanding of leadership describes what labor union leadership can and should be. Burns notes, " The essence of leadership... is the recognition of real need, the uncovering and exploiting of contradictions among values and between values and practice, the realigning of values, the reorganization of institutions where necessary, and the governance of change." <sup>13</sup> It does not just focus on solve problems or gaining benefits, but on what is seen as right. An example outside the labor movement would be the civil rights movement, whose leaders and followers successfully closed the gap between the constitutional values which gave each adult citizen the right to vote and the political reality which prevented non-white Americans from registering or voting in certain areas.

Burns's definition of leadership can be expanded with contributions from the feminist movement of the 1970s and 1980s. The women's movement defined good leadership as having, in addition to its relational and transformational qualities, a quality of empowerment. By empowerment I mean both personal feelings of efficacy and actual increased "powers" or abilities to accomplish desired goals, individually and collectively. It has relevance both within the lives of individuals and within the workplace and society as disenfranchised or less powerful groups seek to achieve a greater voice and influence over the events and decisions which determine conditions of their lives. Empowerment is based on a belief that leadership can be developed, and that a leader's legitimate power is "power to achieve things together with others," rather than power over or power to master or dominate. <sup>14</sup> This is an inherently more egalitarian notion of leadership, as Jean Baker Miller noted, saying that women's "valuable characteristics are common, not rare. They exist in abundance in ordinary women." <sup>15</sup> In feminist theory, the notion of leadership

development was an inherent part of being a leader, based on "women's traditional role to... foster the growth of others... to use one's power to increase the other's resources, capabilities, effectiveness, and ability to act."<sup>16</sup> Of course, this power is not limited to women.

Thus a modern definition of leadership derived from theorists and psychologists which is useful to union leaders suggests that leadership is a relationship, that leadership is transformational to both leaders and followers, and that leadership is empowering-- that is, it is based on increasing the capacity of others and creating together with them, rather than dominating, commanding, or controlling them. This definition is not intended to suggest that leaders never make decisions, never seek control, or always consult and involve their followers in every action. Within this mode there are a broad range of possible styles and approaches, depending on the individual and the situation.

How, then, do actual union leaders define leadership. and how do their definitions resonate with this proposed theoretical model? One broad definition of "leader" suggests anyone who teaches, trains, supports, and encourages others; who takes responsibility for representing, advocating for and empowering others; who is elected or appointed to a position where the well-being of other workers depend on her, and who inspires others to action.<sup>17</sup> In one SEIU focus group in Chicago, women described a leader as "someone who someone has faith in," and "someone who connects people to others." In my 1991-92 survey of 80 union leaders, 85% women and 15% men, there were significant differences between men and women union leaders in defining leadership. Women were more likely to use words like "care," "love," "listen," and "empower," as well as "delegate, teach, involve," and "getting the group to do something." Women spoke about "guiding the organization" and "having a long-range vision." Both men and women talked about "motivating" as a role of leaders, but only men used the words, "give direction" and "make decisions" in their definitions, even though women leaders carried out those leadership roles as well.

Some understandings of leadership were more participatory than others. Women leaders in HUCTW talked about taking their lead in making decisions from the members: "Harvard has

gotten used to it now. We don't make decisions at meetings. We go back and talk about them. We keep organizing, so we can make the decisions the majority of members would want us to make."<sup>18</sup> The union's 1991 standard letter to new employees says, "We organized our union at Harvard around a single idea: that every employee should have the opportunity to participate in making the decisions that affect his or her working life."<sup>19</sup> A Steelworkers woman local president defined leadership as, "Making the decisions to put coalition-building as a number one priority; accepting all views and opinions without limiting input; and moving the group forward for the benefit of all effected (sic)."

Another problematic aspect of the traditional definition of leadership for some workers, especially women, emerges from the Harvard union president's description of the union's rank-and-file leaders:

Leadership is scary for the people I think of as real leaders, at first! They get involved because they believe in the union and want to help it, not because they see themselves as leaders. Only if they are involved for a long time do they feel OK about being called leaders. I think that's because the word suggests authority over others. We don't think of leadership that way. I'm a leader because I accepted responsibility to do things. People are leaders because they're respected and do a lot of organizing.<sup>20</sup>

## Summary

In sum, then, this paper will use a broad definition of union leadership which includes elected leaders who have a clear leadership role and are accountable to a particular base, staff leaders who exercise leadership through their structural positions, and worksite leaders (whether elected, appointed or volunteers) who take responsibility for representing and furthering the goals of the union with their coworkers. Leaders are understood to exist in relation to their followers, and to exist in organizational context, not a vacuum. Of course, a person's lived experience of class, culture, race, and other important identities in our society will affect his or her understanding of leadership and how it is exercised. This is evident when contrasting the experience of growing

up in a Catholic church tradition, where leadership and organization are both highly hierarchical, and a southern black Baptist church tradition, where the local lay leadership often organizes the community's religious practice. There are many more examples, but these factors need to be taken into account by anyone trying to understand where an individual's concept of leadership originates and how it has been reinforced. Some union leaders undertook their roles with a traditional notion of providing a service or an exchange to members and with an understanding of a leader's role as to "command and control." Some adopted what I have called the "collaborative, participatory" model of leadership, seeing their role as empowering, transforming, and relational. There are inherent tensions in both notions of leadership, but transformational leadership is essential to labor's future.

The next section of the paper will explore the historical, political, and organizational context of union leadership, with the goal of setting the stage for the problems of leadership development which confront today's union leaders.

## **PART TWO: CONTEXT AND CONTINUITY IN UNION LEADERSHIP: A HISTORICAL, POLITICAL, AND ORGANIZATIONAL OVERVIEW**

To begin a constructive analysis of union leadership today requires both a historical perspective and an environmental analysis.<sup>21</sup> Together they help explain the culture which shapes union leaders and why they act as they do. The historical approach describes what worked in the past in order to contrast present conditions with past practices; as Michael Maccoby observes, it explains why some practices persist, even though they are no longer effective and may impede adaptation to a changed environment.<sup>22</sup> The following sections will examine briefly the structure and origins of present union leadership, and then review the environmental and political factors which have formed today's leaders.

## A. Organizational Summary: Who are Union Leaders Today?

There are many levels of union leadership. For purposes of this paper, five levels will be examined. At the pinnacle of union leadership are the full-time national or international officers, especially the chief executives, presidents or secretary-treasurers.<sup>23</sup> Most unions have at least two full-time national officers, and there are approximately 100 major unions and associations in the country.<sup>24</sup> I estimate there are 200 people in this category, although the focus will be on the chief executives since they are the principal leaders. Of course, there are many national officers and non-elected staff who have an important impact on policy and program, but they generally operate within the scope of authority and innovation approved by the chief executive.

The second level includes district, provincial, or regional level leaders and staff, who are also full-time and often elected. In many cases these individuals also serve as local union leaders or presidents, and they almost invariably came from that local role to what I will call "regional" leadership responsibility. With approximately 40 per union, there are 4,000 or more of these leaders.<sup>25</sup>

The third level of leadership includes local union presidents, and other officers, who vary tremendously in their responsibilities and power. It is estimated there are 46,000 union locals in the United States, with an average size between 300 and 400 members.<sup>26</sup> The heads of the largest locals, such as SEIU Local 32B-32J in New York City with 65,000 members, have responsibilities on a par with many regional and national officers. Presidents of locals with 500 members or fewer are probably still working on their rank-and-file job either full-time or part-time, and serve at little or no compensation with few resources and no staff. A majority of local officers are in the latter category, but there are a large number in the middle group, with more than 500 members but less than 20,000.

An unpublished 1985 study of California union locals by Marshall Ganz and Scott Washburn showed that the 1.8 million union and association members in California employed



7,000 full-time staff and officers.<sup>27</sup> Approximately one-third of these were full-time officers, the third level proposed here. Another third of these were business agents or paid staff representatives, who constitute the fourth level of union leadership which is suggested here. And about one-third were clerical and administrative staff. There are some problems with extrapolating from these figures, since they probably overrepresent public and service sector workers, but they are the most specific data available. On this basis, one can hypothesize that for the 16.6 million union members in the US, there are approximately 21,645 full-time local officers and 21,645 business agents or union representatives. This amounts to one paid officer or non-clerical staff member for each 386 members, which roughly agrees with the formulas for staffing used by many unions.<sup>28</sup>

The fifth and largest level of union leadership is the rank-and-file worksite leader, often called a steward, who serves as the representative of the union within the workplace. While in a few industries and unions, "grievance committee persons" on the job have achieved full-time union duty status, this is the exception. Most are full-time or part-time workers who have agreed to serve as unpaid union representatives on the job. Some unions do not appoint or elect this level of union leader, and so the members communicate directly with the paid union representative.<sup>29</sup> Because of the wide variation in union structures and work organization, it is very difficult to estimate the number of stewards in the United States. Ideally, a steward will be elected for every 25 to 30 workers, but a more realistic estimate is one for every 100 or even 200 workers.<sup>30</sup> By a conservative estimate of one per 150 union members, there are an estimated 112,000 stewards or elected/appointed worksite union leaders in the United States.

## Summary

A table representing these five levels of union leadership follows:

National Officers	200	0.13%
Regional Officers	4,000	2.52 %
Local Officers	21,645	13.66%
Local Staff/ Reps	21,645	13.66%
Worksite Leaders	111,000	70.04%
Total Union Leaders (US)	158,490	100 %

## B. Where Do Today's National Union Leaders Come From?

The most time-honored method of union leadership advancement is climbing through the ladder just outlined above, from worksite leader to local officer and/or staff, then to regional, provincial or district officer, and finally to the national leadership.<sup>31</sup> In Lois Gray's 1988 study of sixty-one national and international union presidents, she found that 80% of these top leaders came up through this route.<sup>32</sup> This is particularly true for industrial unions and other which have a tradition and policy of hiring staff only from within the union for representation functions. There are some notable exceptions, which Gray found fell into two other patterns: founding your own union (as did Cesar Chavez with the Farmworkers, Leon Davis with District 1199, and Karen Nussbaum with District 925), and coming in from the outside usually with the aid of a professional skill or specialty (as did Jack Sheinkman, an attorney with ACTWU, and Jay Mazur, a pension clerk with ILGWU, ).<sup>33</sup> Few actually achieved leadership through challenging an incumbent. (These exceptions included Jerry Wurf of AFSCME, and more recently, Ron Carey of the Teamsters, in a highly unusual election). Having a sponsor or mentor in union leadership was a far more common basis for their success, along with building coalitions, becoming known through visible successful campaigns, and being in the "right place at the right time."<sup>34</sup> These paths to leadership emphasize continuity over change in union leadership.

Today the youngest top union leaders often combine these traditional routes. For example, Bob Wages, president of the Oil, Chemical and Atomic Workers Union, is a third-generation oil worker who was elected president of his local at age 19, but he went to college and law school at night while working full-time and his first job as a lawyer was with the union. He later advanced to chief counsel, and assistant to the president, and he was elected president of OCAW in the fall of 1991 at the age of 42.<sup>35</sup> Rich Trumka also came from a mineworking family and went to law school, but he had to go back and work in the mines in order to be eligible to run for office before he was elected president in 1982 on an opposition slate against the incumbent Sam Church.<sup>36</sup> John Sweeney joined SEIU Local 365 as a cemetery laborer while working his way through college, but got his first job for SEIU as Local 32 B's contract director after finishing school and working as a staff member for the ILGWU.<sup>37</sup>

And what about women and minorities, who are represented hardly at all in the national leadership of major unions? Only two of the 35 vice-presidents of the AFL-CIO are currently women, both white (Lenore Miller, RWDSU, and Joyce Miller, ACTWU). Two are minority men (John Sturdivant, AFGE; and Jack Otero, AFL-CIO and LCLAA). There are no minority women since the departure of Barbara Hutchinson (AFGE), and Joyce Miller's and Jack Otero's seats were created in 1980 and 1991 to ensure some representation of women and Hispanics. While Bureau of Labor Statistics (BLS) data from 1980 suggests that women held 12% of all national governing board seats, a 1980 Coalition of Labor Union Report, a 1985 update focused on the 15 unions representing 80% of women, and my own research in 1990-92 have shown that the numbers of elected national union leaders who are women have increased barely at all. Women have made limited progress on the appointed and staff levels, and at local levels. But there are remarkably few women national officers.<sup>38</sup>

Minorities have also made little headway, with women of color the most underrepresented. Henry Nicholas, formerly president of the National Union of Hospital and Healthcare Employees, merged part of his union with AFSCME while approximately half the districts, formerly of District 1199, voted to join SEIU during a bitter fight in 1989. He became a national officer of AFSCME.

Dennis Rivera is the current president of NY City's District 1199, and is a prominent Puerto Rican leader. But his union is also considering merger. There are increasing numbers of men and women of color at the regional and state levels of office. But their paths to top leadership roles are as yet unclear.

### C. What does history tell us about the emergence of talented union leaders?

Historically, union leaders have risen to leadership through one of two major routes.<sup>39</sup> Often they came from excluded groups within the working class who had little other outlet for their talent and potential (these included immigrants and their children, especially Irish, Italians, and Jewish workers, as well as African-Americans). Among many examples are John L. Lewis, George Hardy, and A. Philip Randolph. Some union leaders also came from working or middleclass backgrounds with political or ideological motivations for their union leadership activity. Such leaders included Jerry Wurf, Sol Chaiken, and many others. Some individuals overlapped these two groups, as did Walter Reuther. His orientation was socialist but he also came from an immigrant family and rose to leadership through his work in the auto industry. Other examples include Victor Gotbaum of District Council 37, AFSCME, Elinor Glenn of SEIU, and many others.

Today many European immigrant groups are integrated into American society and the vastly inclusive "middle class," and the new immigrant groups from southeast Asia and from Central and South America remain largely unorganized. An important and unanswered question for the labor movement to answer is why this is so. Some unions (UE, ILGWU, ACTWU, SEIU, 1199 and a few others) have made efforts to organize recent Latino, Caribbean, and Asian immigrants. But they have not been successful on scale to date. In New York City, immigrant leaders can still be found particularly in the service and healthcare industries where strong local and regional leaders from Puerto Rico and the West Indies have emerged along with African-Americans. In Los Angeles, San Francisco, and San Diego, Chicanos and Mexican-Americans

have been elected local leaders of the Hotel and Restaurant Employees Union, several SEIU locals, and even a Carpenters local. And an advocacy group for Asian-Pacific Americans in labor is just forming at the national level with AFL-CIO support. But there is no massive organizing drive underway for the new immigrants, the AFL-CIO's innovative LA-based California Immigrant Workers' Association (CIWA) project notwithstanding. This issue must be addressed by those unions which hope to grow in the future.

At the same time, ideologically-motivated participants in the labor movement have decreased in number as socialism and communism have collapsed around the world. While there is still a critical self-defined "left" presence in the labor movement (represented for example by Labor Notes writers and activists, New Directions (UAW) and Teamsters for a Democratic Union (TDU) activists, and the Association for Union Democracy (AUD)), it is relatively small and struggling especially within industrial unions. There is less red-baiting in unions now than there was ten years ago, and less "excuse" for it since few "communists" are left to attack. Not many young people enter the movement from outside its ranks, and even experienced labor leaders do not always want their sons or daughters to succeed them in the union.

In part this is because during the 1960s young left-liberal activists ceased viewing labor as a social change movement. George Meany's support of the Vietnam war, and business unionism generally, caused many youthful and other liberals to instead view labor as a conservative force. "When I joined the UAW in 1948," says Don Ephelin, "Walter Reuther talked about making a better world not just for our members, but for poor people, for kids, for people around the world. It was like joining a crusade. When I think of a twenty-year-old kid now, I wonder why they would want to join the labor movement unless they had some problem on the job. There's no sense of social vision."<sup>40</sup> And Marshall Ganz recalls that young people and civil rights organizers joined the Farm Workers Union in the 1960s and 1970s because "they thought it wasn't a union like other unions-- and it wasn't."<sup>41</sup>

Many "left-liberals" have become active in the growing unions of the service and public sectors where there is more willingness both to hire from the outside and to incorporate new ideas.

In addition, social service unions, representing teachers and healthcare providers as well as welfare and social workers, provide a natural base for rank-and-file people whose caring and concern about social issues translate naturally into their interest in union leadership. These activists come from both working-class and middle-class backgrounds, and their unions represent both low-paid and professional workers. Examples are the SEIU, AFSCME, 1199, AFT and the AAUP.<sup>42</sup>

### Federation vs. Organizational Leadership

Another important distinction pointed out by John Dunlop is between leaders who are effective heads of national organizations and those who can lead federations.<sup>43</sup> The leaders of great industrial unions, including John Lewis and Walter Reuther, found it more difficult to lead federations of unions. Federation-style leaders also tend to be supported for their abilities as conciliators rather than as innovative, polarizing, strong, challenging leaders. Federation leadership does not encourage change but values stability, or, as George Meany put it, "holding the boys together."<sup>44</sup>

This distinction is especially important today when considering how many national unions today increasingly constitute federations of smaller unions and associations. In addition, the merger trend is increasing with the AFL-CIO's full support. Most building trades and craft unions, like the Carpenters and even the Service Employees, were founded and structured as federations of locals, rather than with a national mission. Their per capitas tend to be lower, their contracts and political strength more locally based, and their ability to guide their members to any unified national or regional action far less. In contrast, the industrial unions which were created by strong decisive leadership at all levels of the organization are now struggling for survival amidst extreme membership loss and industry contraction. There are no traditionally-shaped "industrial" unions in the service and public sectors, although there are significant differences in structure and leadership within the growing unions (CWA, SEIU, UFCW, AFSCME, among others). These deserve further exploration.

## D. What has Changed in the last 30 years?

The last thirty years have seen a changing of the guard of labor leadership, and some would argue that the labor movement is poised on the brink of another important generational and industrial shift within the next decade. George Meany served as head of the AFL and then the AFL-CIO from 1934 to 1979. He was Reuther's nemesis and opposite, and has been described as "an organization man... he never walked a picket line, organized a local, or led a strike... [He was the] product of ancient, exclusivist traditions of craft unionism."<sup>45</sup> But he did act as an effective "federation-style" conservative leader. When he turned the federation over to his long-time assistant and chosen successor, Lane Kirkland, a Southerner and former administrator affiliated with the Masters, Mates, and Pilots Union, the ideological direction of the labor movement did not change significantly. Kirkland led some important new efforts, including the 1982 Solidarity Day rally, but it appeared he was not committed to a much broader social vision of unionism. His apparent chosen successor, Tom Donahue, is more inclined to look critically at the labor movement and to think broadly about the future, but when and if he will assume leadership is unclear.

Individual unions have changed leaders as well. John Sweeney, who has a college degree in economics, succeeded "fire and brimstone-style" George Hardy as head of SEW in 1980. He has focused on professionalizing the union, increasing its organizing and political activities, and expanding the services offered to local unions from the international headquarters (adding health and safety, education, retiree programs, a Canadian coordinator, local union administration, expanded field staff, member benefits and services programs, and communications services, among others). Gerald McEntee, a graduate of the Harvard Trade Union Program, won the leadership of AFSCME after the death of his flamboyant predecessor Jerry Wurf in 1981. In both cases, the older leaders had been "entrepreneurial" founder-style leaders who focused on organizing above all else. The successors were more attuned to conciliation and institutionalization-- seeking growth with professionalization. African-American leader John Sturdivant won a contested election from Kenneth Blaylock in becoming president of AFGE.

Trumka and Wages have already been mentioned as young, newer International leaders. While all but Sturdivant are European-American men, they represent a different, more educated and professional tradition than did the entrepreneurial organizing leaders who were their predecessors.

But is this enough? Labor history suggests that during periods of labor movement growth, unions developed and supported leaders on the shop floor and at many intermediate levels, as well as having visionary leadership at the top. The 1930s organizing successes of the CIO were characterized by massive organizing and leadership development at the plant levels, within "women's auxiliaries," and through newly-formed regional and national unions.

### E. Organizational and Environmental Factors: The Political Context of Union Leadership

"Democracy, translated into modern English, (means) labor union inefficiency." <sup>46</sup>

-- John L. Lewis

The national level of leadership is where the tension between being an elected democratic leader and an effective organizational leader is most clearly visible. There are many constraints on union leaders, as John Dunlop points out:

Union executives need to accommodate their membership, employers with whom their organization deals, governmental agencies, and the public. The task of generating organizational momentum toward cherished goals is constrained by managing divisive internal elements and external constituencies. There is little room between destructive organizational conflict and immobility in a rapidly changing Environment. <sup>47</sup>

Their elected status presents great challenges for union leaders which are very different from corporate executives or leaders. As Charles Heckscher and others have observed, unions must act both as participatory, voluntary associations dependent on the active involvement of their



members and as disciplined organizations with a unified strategy and tactics engaged in long-term battle with centralized powerful employers.<sup>48</sup> This tension suggests why loyalty is valued as highly as "competency" in many unions, particularly among long-term staff and leaders. But it poses real challenges for union leaders.

There is a partial exception to the strict emphasis on conformity and loyalty: leaders have some understanding of the tendency of young people and organizers to be "agitators" or troublemakers-- up to a point. Broad rejection of arbitrary authority is part of their job as they persuade workers to stand up for their rights against employers who deny them participation in decisions and profits. Not surprisingly, the organizers will not be tolerated if they make a serious challenge to the national officer's leadership. But their energy is valued. Some national labor leaders even look back Somewhat fondly on their youthful style, but with a belief that their maturity has brought better ways to do things. President Bill Bywater of the IUE, for example, said:

I was really very super militant... you're young, you're crazy like that. When I stood up on the bench at Ford Instrument and told everyone to stop working, I mean that was a stupid thing for me to do. It worked, but it was stupid. I wouldn't do that now, I'd file a grievance or create a slowdown in some way where you couldn't actually point a finger and say, 'Hey, he stopped the plant from working. I'd do it in a more subtle way. I am more of a diplomat now than when I was a kid.'<sup>49</sup>

Another national leader, UPIU Secretary-Treasurer John M. Defee, says,

I...was probably mouthier than most. Yeah, I was considered an activist then, but I'm long past that now. I've definitely mellowed over the years, no doubt about it. And of course that bothers me sometimes too. I came from that old school where you stood on the floor and frothed at the mouth and your eyes turned white, and you did everything you could to get attention for whatever your cause was.<sup>50</sup>

Some would argue that these leaders's "younger" way of doing things provided inspiration and leadership to the membership. This "routinization" of charismatic leadership, if it is understood as such, tracks Weber's and Michel's predictions about what happens to movements and their leaders as they become institutionalized. Perhaps labor should look to its youngest leaders and to its organizers for future leadership. And yet, far more than militance is involved in being an effective union leader.

## The Role of National Staff

National or international representatives and organizers, as well as the body of staff specialists and managers who work from the national headquarters, are an important resource for leadership development. Some of them come from local union leadership roles, and are on their way to national leadership jobs. Many travel widely, assisting locals and representing the national officers. But most are long-term professional staff, who perform a variety of assigned tasks at the direction of the national officers.<sup>51</sup> It is not in the scope of this paper to examine their role thoroughly, although its importance is often underestimated by outsiders since their influence is hidden by the political context in which their work occurs.

## Local Leaders

The next sections of this paper will explore the meaning and paths to participatory leadership roles at the local levels of unions, where the everyday relationship with members is much more direct. Most international and national union presidents are elected by convention delegates, and their immediate constituency is really the leaders of large locals or important regions, provinces, or districts. Within SEIU, for instance, nearly 80% of the membership is concentrated in the largest 50 locals which represent more than 5,000 members, even though there are a total of more than 300 locals.<sup>52</sup> Those 50 locals are nearly all represented directly on the International Executive Board. At the local level, however, union members directly elect their leaders at least once each three years. Thus there is more direct accountability, more responsiveness to immediate member concerns, more political maneuvering by leaders to retain their role, and more turnover in the event of an unsuccessful or unpopular leadership strategy, particularly those relating to contract negotiations.

Where do local union leaders and stewards come from?

Most local union leaders are elected from the membership. Quite often, if the local is large enough to have a paid staff, leaders have served as paid staff members first. The patterns are naturally different in the different kinds of unions. In the building trades, it is common for the "business manager" position to be an elected full-time one which is filled by someone who has held an uncompensated officer position immediately before. In the industrial unions, local presidents are often elected at the shop or plant level, usually after serving in a steward, bargaining committee member or grievance committee-person role for some period of time. And in the service and public sector unions, local union presidents usually are elected from the rank and file but there is frequently a professional staff member, perhaps an executive director, who directs the day to day operations.<sup>53</sup> Some such unions have combined these roles by creating an elected president or elected "executive secretary" or "executive director," with this person frequently coming from a staff position. This is typical of social service worker unions and professional unions like the National Education Association's state-wide affiliates. Another important leadership tension has to do with the relationship between staff and leaders, since often the appointed staff serve as de facto leaders of the worksite leaders and carry out the union's message with members far more widely than the elected leader can. Some unions prohibit their staff from maintaining an active union membership in the local for which they are working to prevent the possibility of running against the current leader, others rely on staff loyalty to ensure there will not be divisive challenges to power. Still others permit the staff to maintain membership and expect that on occasion there will be fights. In cases where the union representatives also serve on the elected executive board, the chief local union leader has considerably less control over their work performance than if they were appointed. This can create serious tensions among leaders, since the staff typically have more membership contact than the chief executive. Again this explains why "loyalty" and knowing the rules of the game are valued highly among union staff, and why union staff sometimes are hired based on their willingness to support the existing leadership.

Part Two has briefly reviewed the historical, political and organizational context of several levels of union leaders' emergence and rise. While there are some changes occurring in both the generation and the educational background of union leaders, they have so far had the effect of professionalizing the union staff and organization and directing it away from its entrepreneurial and ideological origins. The question of why today's new immigrants are not being organized and emerging into leadership roles remains unanswered. The political nature of unions, along with their status as voluntary social change organizations dependent on mobilizing their members to achieve power, produce conflicting pressures on union leaders. These tensions are played out in a variety of ways. The next section will advance a five-stage theory of leadership development and examine the role of training on and off the job.

### PART THREE: FIVE STAGES OF A UNION LEADER'S DEVELOPMENT

This section will argue that there are five stages of a union leader's development. These include "entry" into leadership, "orientation" to the role, "training" in performing the leadership role or job, "work experience" in which the leader practices and improves her or his skills and masters the role, and finally "leadership" or passing on the skills and leadership roles to others. My research suggests that the earliest stages are most important in terms of shaping a new leader's ideas of what the organization values and expects in leadership. Therefore, although "entry" and "orientation" may be brief in time, and formal "training" either brief or non-existent, they are very important stages. A leader may go through these stages over a short time or throughout a lifetime of work. In addition, sometimes the cycle is repeated, as when going from a worksite leader to a staff or full-time elected leader, or from a local to a national level leader. Rarely are these stages consciously addressed either by the leader going through them, or the leaders and staff who are responsible for organizing the newer leader's experience. There are important exceptions,

however, and one of them will be described later in the HUCTW case example. Of course, generation, class, and ethnic or racial background have a critical impact on a leader's experience at each of these stages. Nonetheless, each leader would encounter these stages of leadership at some time and her experience would be profoundly influenced by the union's approach to them.

## Stage One: Entry into Leadership

Most future leaders are first recruited by a fellow worker, union leader, or union staff member to take on the role of a shop steward or workplace leader. My research suggests there are two kinds of life experiences which make people more likely to become a union leader. The first revolves around the teachings and examples of family members and teachers. Family influence was felt in one of two ways: either a parent had been in a union struggle or leadership role, or parents passed along values which became the basis for the child's belief in union values of justice, equity, and fairness. Women leaders mentioned both mothers and fathers as role models and influences; men leaders surveyed mentioned only their fathers. Of course, men were 80% of union members up through the 1960s, so fathers were more likely than mothers to have been in unions. Here are some examples of family influences:

My father, he was an organizer of bakery drivers in the 30s and organizer and later chairman of the Brotherhood of Railroad Trainmen in the 40s through retirement in 1973. I helped him with his filing and typing from the age of 12. (UFCW, 24 years)

The women that organized our local encouraged me. But my mother and her ongoing activism in human rights, raised me to get involved (USWA, 6 years )

Being a third generation union activist-- my family's belief in collective working people's rights and power. (Minnesota Association of Public Employees, 19 years)

My father was a longshoreman in Brooklyn, NY. As children when my father decided to become a shop steward on his pier, his life was threatened. Our house was shot at, and he had a very mysterious accident. He told us that even when you are fighting the boss you'll have to see that social changes are made at the same time. (District 1199)

The principle I learned from my parents, my belief in Human and Civil rights-- spiritual belief-- my aunt [and] her struggles as a woman. Personally, the guts came from experiencing sexual harassment in the plant in the 60s. Working conditions, etc. (UAW)<sup>54</sup>

After family influences often came teachers. For women leaders, teachers sometimes presented an alternate role model. Nancy Mills, former executive director of SEIU Local 285, says:

Social justice was a family legacy-- to make the world a better place for humanity was a privilege and an obligation... but as I watch my daughter grow up I realize how important teachers are and what an influence they can have. Miss M... took an interest in me and encouraged me... She encouraged my activism and sharpness... Miss T... invited us to her home... She showed me that I could do things differently, and encouraged my more creative and quieter side. Both were significant, because they showed that women could do things differently. They were the antithesis of my mother in some ways. They were independent unconventional women.<sup>55</sup>

After family and teachers, the women leaders described later working experiences which motivated them to seek leadership. These included most importantly an individual or several individuals who had encouraged them, taught them, or pushed them to take a leadership role. Here are some examples:

There was one person that pushed me to become active in my local... She taught me what I know today. One man that stood by me, when I was discriminated against... (ACTWU local president, 49 years active)

My present unit president who believed in me... (CWA unit vice president)

An attorney who devoted his work to the labor movement and spent hours and hours and hours talking and explaining and educating me (CWA staff representative)

Colible Taylor was the first Black woman that motivated me to become more involved in my union. She was the Vice President of AFL-CIO in Louisiana at that time. (IUE International Rep, 11 years active)

Men too often named an individual, although one man said there was no person who influenced him: "Ran for office out of desire to correct situations I do not agree with." But for most men and women, having a mentor clearly made a difference. One Steelworkers staff rep said "The USWA sub-district director. He was active in the CIO and the formation of the USWA in the late 30s. He gave me a first hand education and showed me that I too could make a difference (I have)." These

findings agree with the classic work of Anne Nelson and Barbara Wertheimer in Trade Union Women: A Study of their Participation in New York City Locals, which showed that most women who moved from "members" to "leaders" of the union did so as a result of individual encouragement, usually from union leaders.<sup>56</sup> This and other research suggest that the most common and effective mode of leadership development is encouragement and recruitment by current union leaders.<sup>57</sup>

Aside from an individual who recruited them, leaders seemed to have been mobilized into leadership by organizational and personal experience with injustice successfully challenged. Women leaders particularly described seeing terrible conditions which inspired them to become involved because of their desire to help others. On many occasions, they were "reluctant leaders," who said there was simply no one else to do it. Sandy Felder, the president of SEIU Local 509, is perhaps a typical example. She went to a worksite meeting called for the local and no one else was there. The union rep talked with her about the problems and asked her to bring some people to the next meeting. She did, and they elected her steward. Fifteen years later, she became the local union president.

Women were more likely to articulate their reasons for becoming leaders as helping others than because of their own ambition. This was also true of men, but to a lesser degree-- or at least male leaders were more willing to admit to wanting to win political office. For example, Edward Fire, now the secretary-treasurer of the IUE, describes his first run for local president: "Once I got a taste of being vice-president, and functioning as president occasionally when he was out of town, I knew I wanted to become president. I ran against the incumbent..."<sup>58</sup>

Finally, sometimes poor working conditions or dissatisfaction with the union's handling made people want to become active. For example, one CWA local president said, when asked what influenced her to take on leadership:

When I saw unfairness in the workplace and when the laws of the land were discriminating against women and minorities. When I served on the bargaining committee and found women were not given the same chances of promotion and

the wage rates needed to treat women's jobs with respect.

Seeing bad conditions was not usually enough to motivate people to take on leadership roles.

Having a successful experience was important. One woman miner said, "I was trying to get job training for advancement in pay and classification. I went to a women miners' parental leave coordinating session in DC in 1983 and the women I met told me how to use my union to get training. I went back, it worked. I became hooked on the union." An SEIU officer said "Serving on my very first bargaining committee," was the key event for her. A teacher said, "I was laid off my first year of teaching. My union, a minority organization in that district, successfully challenged the layoffs." Another woman said:

I was hired into a union sewing shop in 1970. We had a very good contract with excellent benefits; however, our Plant Manager was very condescending to women. Sometimes the problems would grow so enormous that we would have to walk out to get attention. This made me see the power of unionism.

In other cases, having the opportunity to get training and education made a key difference to women. This could be formal or informal. One teacher said:

Attendance at a national AFT convention in 1985, just when collective bargaining for teachers was sweeping the country, inspired me to become active in and committed to my local. A subsequent visit from our national president and listening to his ideas was especially inspiring.

An auto worker said:

The first time I went to Black Lake Michigan, I was very impressed. From then on, I decide to do our best.

Her experience was echoed by another woman UAW leader, who said "attending classes at Black Lake" had motivated her to get more involved.

Of course organizing campaigns effectively served to bring many into leadership. A Jamaican hospital worker said, " In 1969 when I was organizing the Brookdale Hospital Center, I gave out the sign-up cards to the employees. I could have been fired but I believed in the cause. We had no benefits at that time." A CWA local president told this story:

An older Cuban woman worked for Pacific Bell for a few years and had a sad life story (left Cuba with an infant and two toddlers). Kathy received news that her husband was finally released from Cuban prison and joining her in California



after more than 10 years. We weren't represented (yet). Management would not give Kathy an extra day off (for a three day weekend) to renew her marriage vows! It would not have been the case if we were union. I organized the unit right after that, even though I knew NOTHING about unions and was raised anti-labor.

Stewards tend to have significant longevity on the job and as a steward. The average length of work experience was 17 years for the women and 21 years for the men in Pam Roby's study, while their average length of steward experience was just a few years less.<sup>59</sup> The study of NY City stewards found that 65% of men and 70% of women union activists were over 45 years of age. This suggests that people become active on the job early in their careers and stay active for a long time, and also that unions need to do a better job of recruiting young leaders to round out their steward ranks.

In sum, the research shows that early life experiences, particularly family and teachers, had a strong influence in shaping values and orientation to labor. The psychological literature would send us back further in people's lives to find out whether and how these leaders developed a strong sense of self as small children, but such information was not available in this study. But regardless of early life experience, there were other ways people entered into union leadership roles. Some wanted to be leaders, and the union provided an avenue. Others wanted to act on their values and beliefs, and the union served as one way to do that. Others wanted to help others, and again the union was a good forum. Some were impressed by collective experiences either of union power or of training conferences and political meetings. And many, many of the leaders were urged, pushed, or pulled into leadership roles by another human being, usually an individual close to them who already held a leadership role with the union. This suggests important lessons to which this paper will return in the case study and conclusions.

### Entry: Recruitment and Hiring into Union Staff Roles

This section will discuss entry into the union for staff. Entry into union staff jobs is the critical next step to leadership for a rank and file activists with extensive experience. Briefly, there

are two routes to a non-elected staff job: hiring from the union's membership, or hiring from outside. The research suggests that the first is far more common. But very often political realities mean that the pool of people hired are not representative of the membership, and that they are hired for continuity and not change. For women and minorities to gain not just the skills and experience needed (for it is not clear they have less than currently hired candidates), but the access to and credibility for those jobs may require both the individuals and the unions to make extra efforts.

These may take the form of apprenticeship or intern programs within a union, or extensive volunteering. The HUCTW encourages activists, for example, to use their vacation to spend a week with the union organizer in their area to get an idea of what the union is doing. Even if they don't apply for jobs, a larger purpose is accomplished: increased commitment to and understanding of the union's role. The AFL-CIO Organizing Institute now runs weekend-long trainings for people who want to become part of the labor movement through organizing, and this serves to identify a group of diverse people who are potential staff organizers. About half are from currently unionized groups, and about half are students or recent graduates. The large majority, because of targeted recruitment, are women and persons of color.<sup>60</sup>

Another way to increase the entry to staff jobs is to help people move through issue training and specialization, for instance in health and safety. Many unions have expanded their health and safety programs recently, and do a good job training activists on particular issues. Still another possibility, used by the UFCW, ACTWU, HERE, UE, AFSCME, and the SEIU, at least, is to employ lost time organizers for organizing campaigns. This means the union pays the lost wages of a union member who takes a short leave of absence to work for the union. It provides valuable experience and connections to the organizer, and valuable support to the organizing drive. It also serves as a form of training and testing. Some of them do well and are retained for more permanent jobs; very often, if they stay on as organizers, they are required to travel for long periods to do their jobs. This is difficult for many women, especially those with young children, because of the current unequal distribution of labor in the home. But the practice does recruit

talented rank and filers, who are more likely to resemble their coworkers in race and gender, onto union staffs.

Finally, where specialized training is needed before hiring, the union can sponsor scholarships to schools or other training programs for its activists. The Harvard Trade Union Program trains some rank and file activists each year with an exceptional program of economic, political, historical, and organizing classes. And of course, the union must ensure that it is not discriminating in its hiring processes. For instance, apprenticeship-based promotion patterns may have a discriminatory effect by mirroring employer discrimination.

### Summary: Entry

Overall; the research suggests that openness to people from the outside, affirmative action, established training programs, and the atmosphere and "people" of the union are what attract women and minority staff from outside the union. For hiring women and people of color from within, unions have to examine their own career patterns to ascertain whether they have a discriminatory effect on women. In addition, lost-time organizing jobs may provide a good way to enter union work. But salary, travel and relocation requirements can limit the number of women or family heads who can accept many union jobs. And unions have an obligation to reduce those barriers.<sup>61</sup> There are a variety of creative ways, some of which are listed above, in which the union can increase access to its staff jobs for rank and file leaders.

### Stage Two: Orientation to the Union

Very few unions have orientation programs for new leaders, or new members for that matter. When someone joins the union or takes on a leadership role, it is critical for them to feel good about the organization they are representing, and to understand it. Materials and a process

for introducing new leaders to their new role are important. Workers of color and women, even those from union families, need to see images of the union that include them, and to have a clear sense of the union's values and goals.<sup>62</sup>

Today, high-quality videos and brochures can be produced with relative ease. These could include a sense of the union's history, and the present membership and goals of the union, both at the worksite and in the community. The future vision-- where the union is going-- is especially important in these days of union defeats and poor public image. It is important that orientation materials emphasize the past and current contributions of women and people of color. For new leaders, material which welcomes them and focuses on their role and importance to the local as well as ways they can get support is most effective. An orientation period, whether for new leaders or new staff, ideally should be designed so that it includes some mentoring and/or networking component. Labor history deserves inclusion. Professor James Green of the University of Massachusetts at Amherst has developed an excellent history of the United Mineworkers Union which emphasizes the values of the current leaders and their continuity with the past.<sup>63</sup>

Orientation expresses the values and vision of the union. If there is none, it is much harder to build a shared sense of community, identity, and common goals. The earlier in the member's or leader's exposure to the union such an orientation can come, the better. Some locals hold stewards' trainings annually which serve as their orientations-- but many unintended impressions may already be internalized if a steward waits nearly a year for his/her orientation.

There are logical times in a union's contract cycle to perform new leader orientations-- after a new contract, when new leaders are elected or appointed, or when there is a major program or structural initiative emerging from a local, central body, or national office. Orientation should include an acknowledgement of leaders's family and other outside commitments. The leader conducting the orientation can express support for their multiple responsibilities and ask how the union can help them to be active. Women leaders could benefit from this especially, given the unequal division of household labor in most homes.<sup>64</sup> Just asking the question acknowledges the

stress that union and family and work responsibilities create for working parents, and the union might get some good ideas.

Orientation for new union staff leaders is just as important. Very often there is no formal positive program, or the staff are sent to a training program months after arriving on the job. The first days and weeks of any job can feel like a series of tests in a complex male initiation rite to new staff. Unions as employers, with their heavy focus on seniority and "paying your dues," must be especially cautious to avoid isolating new staff. This occurs less often if the new person has a mentor or supporter who has helped bring them on board, but this is true less often for women and minority staff. As a positive contribution, orientation can promote teamwork, feedback, egalitarian attitudes, and a mentoring system. The culture of the union and the extent to which it values its "people" resources are evident from the earliest days on staff.

At SEIU in 1988, a new staff orientation notebook was developed which attempted to cover both staff policies and procedures and an introduction to the people, leaders, and stories of the union. A supervisor and a lead staff worker were asked to review it with new staff, and the evaluation has been generally positive.<sup>65</sup> Putting the extensive materials and notebook together emphasized once again how much there is to share with a newcomer, long-term staff had absorbed a lot of the culture and stories of the union over time. The UAW for some time sent new staff for two weeks to Solidarity House, the headquarters in Detroit. By the time they left, they had learned something of how to dress, think, and act like a UAW representative.

In sum, a good orientation takes effort and forethought, as well as staff and leadership time to carry out well. For women and minorities, union leaders must be especially sensitive to cultural differences. Giving new hires or new leaders a sense of welcome and "belonging" is a powerful tool. Orientation must include the vision and goals of the union, as well as its values of social justice. These principles could be applied to member orientation as well and would probably serve to increase member loyalty to the union. District 1199 in New York is one union which has established an orientation period which is paid time negotiated for new members and which is led

by retirees who tell the history of the union. This is a superb idea. Perhaps it could be expanded to orient new leaders.

### Stage Three: Training

All women, and especially minority women, request training programs more often than men.<sup>66</sup> Some speculate it is because women have less self-confidence and so need more reinforcement and certainty before taking up new tasks. Deborah Tannen, in her book You Just Don't Understand says that women are more acculturated to asking for help while men see it as a sign of weakness.<sup>67</sup> Many unions operate on one of two philosophies: either "sink or swim," which holds that new staff and leaders learn by trial and error and that no one can help them; or "born not made," the philosophy which suggests that leadership cannot be learned through training or any intervention. This often reflects the life experience of existing leaders, who benefited from little or no training on their way up.

It is important to distinguish "formal" training from the constant learning and training which union members from the time they take on their first leadership role. Most stewards model themselves on the union rep's way of doing things, even if they get only a five-minute orientation. Most union reps model themselves on the local leader's style. Most local leaders learn from leaders in positions above them. Few of these lessons have been formalized. The intertwining of this section and the next, "Work Experience," will demonstrate how closely tied formal and "informal" or "work-based" or "guided experience" training actually are.

A key to good training is giving people responsibility which is both meaningful and challenging, and then providing them with support so they can succeed. It is best if the real experience is preceded by some discussion of what is to happen and what is needed to make the task go well. After the completion of the responsibility, a good training experience would continue with a debriefing and analysis of what went well, what could have gone better, and what the trainee will do differently next time. Positive reinforcement is critical.

Training for union leaders is very uneven. Some kinds of training, like basic stewards training and grievance and arbitration training, seems to be well developed and materials are sometimes even shared between unions. How often training classes are given and how effective they are in equipping leaders with basic skills in contract administration are questions which have not been measured, and whose answers may vary widely. But training for new organizing, for top leadership responsibilities, and for managing internal conflicts as well as strategy for external struggles with the company are all relatively rare.

### How are local union leaders trained?

Local union leaders have the least formal and informal training of any union leader, even less than stewards or worksite leaders. Usually local unions hold regular steward trainings, even if only annually, and international offices publish materials on the duty of a steward. This arises in part from National Labor Relations Board (NLRB) findings that stewards are official representatives of the union, and the union can be held fiscally responsible for any breach of duty of fair representation committed by a steward. Thus unions, if only to protect themselves from lawsuits, are motivated to make certain that stewards know what is in the contract, can file grievances in a timely manner, don't refuse to help a member unlawfully, and know when to call the paid staff representative, who is expected to know more and to represent the union on a professional level. Many unions in addition recognize the critical nature of worksite leadership since the steward is seen by members as a symbol of the union, and represents the union's best chance to involve and communicate with members who rarely attend regular meetings. Therefore unions establish varying kinds of steward training programs, steward recognition and award dinners or ceremonies.

### The Significance of Union Education Programs

The ideological orientation of UAW leaders meant that they valued labor education in its own right and as a principal function of the union, as well as a way to create a strong union culture and build a political base. Thus in 1970 they built Black Lake, a labor education center in Northern Michigan for union members and their families. The union holds extensive training sessions there for staff and local, regional, and national officers, and includes their families. They also allocate extensive resources to education, including earmarking funds from their substantial strike fund interest. In addition, they have bargained for funds for training. Don Ephelin explains why he negotiated the jointly administered training funds which pay for local union leaders to spend four weeks in the PEL program learning about the industry and their roles as union leaders:

I found myself trying to explain to 400 or 500 local union leaders at the end of bargaining what we had done and why it was good for them, after we were buried in data about the company, the economy, and the future. I wanted them to learn about all these things for themselves, so they could make better judgments on the contract being proposed and on the future of the industry.<sup>68</sup>

Thus, UAW union leaders found that their goals of building a strong unified culture and ensuring political support could be met through conscious, planned leadership development-- and at the same time, the training sessions gave them a testing ground for new leaders and staff who gained competence and understanding of the union and the industry.

As the UAW demonstrates, a union's education program tells a great deal about the historical culture and the leader's vision of the union and what he or she thinks the job of the union is. For example, an education program which focuses exclusively on grievance handling skills suggests an emphasis on turning the stewards and staff into "junior lawyers." It means they are likely to spend most of their time reacting to management by filing grievances, and that the training is needed so they can file and win grievances more effectively. "We are training people to handle grievances and do all these legalistic things, which we already know how to do very well," says Ephelin. "But we are not telling them what the union is or what it stands for."<sup>69</sup>



An alternate and less frequently practiced approach to steward education focuses on the steward as organizer, or "leader of leaders" at the worksite. In this training, the stewards spend time discussing the values of the union and their role in strengthening the union by taking initiative on the job. Grievances are discussed, but in a far more minor way and with the goal of keeping management honest rather than building the union around individual problems. One example is the Harvard Union of Clerical and Technical Workers Union (HUCTW) training for its activists, which emphasizes problem-solving and organizing skills. One activist who was trained by HUCTW says:

We had an exercise where each person answered some questions after we all heard the same story. Then the group answers them after discussion. It turns out you can't answer any except one of the questions because the information wasn't sufficient or was ambiguous. The group figured it out, but no one of us did.

I learned that I had been making assumptions when I should have been asking questions. I needed to get more information. I didn't need to answer it alone. No one person has the absolute correct answer. Afterwards, I worked differently. I asked people what they thought, and I understood they had different perspectives... I had more confidence to take an active role in the process, exploring what happened.... I learned that leaders offer ideas, not direction.<sup>70</sup>

So a union education program reveals a great deal about important values and beliefs. Marshall Ganz recalls trying to put together training programs for the United Farm Workers of American (UFWA) job reps when the union had just won first contracts.

I got training materials from all the other unions, and they were all about processing grievances. We wanted our stewards to do more. They had a series of leadership responsibilities, including promoting the programs, recruiting other leaders, organizing the unorganized, and so forth. Of course it included processing grievances. But they also had broader union-wide responsibilities, such as to help with political action. We did not want to define the essential business of the union as defensive-- reacting against company violations of the contract. We did want to define the positive role of the union in making a better world, including all these aspects.<sup>71</sup>

What kind of training options are there?

Unions will have a hard time developing female and minority leadership if they aren't open to developing all leaders. If the local and its leaders have a closed culture and a "service" rather than "empowerment" approach to handling worksite problems, they will be unlikely to identify, recruit, train, and sustain leaders. In addition, leadership development and training at the worksite level is incredibly demanding and rewarding. It requires a major time commitment on the part of the local staff and leadership and a never-ending effort to find and develop worksite leaders.

This means more than sponsoring an annual steward training class, which most unions do. That class is vitally important, for it conveys what messages and skills the union wants the stewards to have. But many stewards are appointed or elected in between the class, and many others are at a more advanced level than "one class fits all" can accommodate. In addition, stewards need the same kind of ongoing "guided experience" that staff need-- i.e., the staff person or leader has to ensure that they have a key role to play, that they have the tools to succeed, and that they get feedback on their performance.

Most union education departments have developed specific materials for their members and industries. Yet steward training in most locals is not very exciting and not very well developed. Done well, training gives confidence as well as skills; it can help change attitudes as well as provide knowledge. The most difficult component is not viewing it simply as an "event" but as an ongoing process which requires continual time and effort.

It is easier to file a grievance yourself than to teach someone to file it; easier to file a grievance than to help your steward organize a worksite protest. And yet each of the more difficult choices pays off more in the long run. The unions of the future will invest in new, challenging, and time-consuming steward and worksite leader training programs .

### Formal Training Programs

Formal training programs can and should be held at all levels. At the local level, training programs are essential. Also, individual unionists in major cities often can take advantage of university labor education programs which provide adult education, evening classes and even

college degree credit. Two excellent programs are at Wayne State University in Detroit and the University of Massachusetts. The regional union can hold regional training sessions for union staff and officers, and often the national union holds national or regional staff training as well. Many of these sessions are conducted at the George Meany Center for Labor Studies, which also offers a wide variety of union skill-building classes and a college degree program to members of all unions.

There are also excellent multi-union efforts held in various states and regions. One of the most notable is the joint University and College Labor Education Association (UCLEA) and AFL-CIO summer school series for union women. These week-long training programs are organized around the needs of workplace leaders and are held once a year in each of four regions. The summer schools have trained more than 4,500 women in the 15-plus years since their founding. They generate tremendous energy, confidence, networking and support for rank and file union leaders, particularly those from unions where women and minority leaders are rare.

Minority women make up one-third to one-half of participants, and each school carefully evaluates its classes and plenary sessions. These records are excellent documents for studying women's participation in their unions, and most women come to the schools as first-time participants. Now 90% of them are sponsored by the local or International union. While this training can only accomplish limited skills enhancement, since it lasts a week and can't provide for much follow-up, it is making a great contribution to women's leadership development and could be expanded dramatically.

In Massachusetts a group of extraordinarily creative and dedicated women unionists and labor educators crafted a coalition with the Massachusetts AFL-CIO in 1986, and created an annual weekend training and leadership development program called Women's Institute for Leadership Development (WILD). Now in its sixth year, WILD has a full-time staff director and a new multicultural board of directors.<sup>72</sup> WILD's leaders are seeking ways to carry on the training during the year with a more intense focus on some local unions who want more in-depth leadership

training work. Both these programs provide training opportunities for leaders and ensure team teaching and diverse leadership roles so that training knowledge can be shared.

There are many other formal training programs, both within individual unions and sponsored by university and the federation training centers, which focus on minority leadership development, particularly for African-American men and women. The lessons of WILD and UCLEA, as well as the University of Michigan program for women and minority trade unionists, track the criterion listed above with one addition: founding such a program and carrying it on requires a tremendous commitment of time, effort, and attention from the trainers and leaders. And while the planning and leading of such programs develops leadership skills and support networks among more experienced unionists, there is a cost in time and energy, which is often unrecognized by the participating union or university employers.

Some outside training is available, of varying kinds. The American Arbitration Association trains in skills, but not in leadership. The Federal Mediation and Conciliation Service has provided joint training for union leaders and managers. The ten-week, high-quality Harvard Trade Union Program had its largest class this year, with 36 trade unionists, one-third of whom were from outside the US. On the organizing side, the community organizing tactics of the Midwest Academy in Chicago and the Industrial Areas Foundation training classes have proved very valuable to some. And independent consultants and labor educators can also be helpful, although they are usually employed by very large locals or by national unions themselves.

The challenge for such multi-union and national programs is to integrate the formal skills training they offer into the daily lived experiences of learners, which creates a much more powerful learning experience. Some are seeking ways to do this. For example, the Meany Center is creating a pilot "leadership certificate" program which will combine a series of classroom training weeks over several years with a mentoring and field experience component for enrolled leaders. The difficulty of doing this from outside the union, or even from outside the local, is that truly integrating the training requires inquiry into and sometimes challenge of the way local unions are run, which is almost politically impossible.

## Summary

Informal training will occur whether or not it is planned; the only question is what the future leader will learn from it, and whether it will be in concert with union goals and formal training. The "sink or swim" philosophy leads to an effective training in how to survive, which has some benefits but is mainly destructive. Conscious, active, integrated and continuous training, as described in the HUCTW case study, is by far the preferred model. And training should challenge people to think, not just to learn specific technical skills. The U Mass program requires "competencies" in broad areas like "conflict resolution" in addition to specific credits in contract bargaining, for instance. This is an example where union leaders and trainers can learn from the labor educators' approach.

Many union leaders may have had bad experiences with training or education; some feel insecure in the classroom or uncertain about their reading and writing skills. This is far less of an issue with white-collar and professional workers, of course, but it is a serious issue with new immigrant workers who may need training in their native language, and for those who went to poor schools. Unless one has a union culture (like the UAW) where education and training is prized, admired, and respected as an activity at the core of the union's work, then education will often be unrecognized, unrewarded, and undervalued. Even SEIU had only two full-time national education staff in 1989, and few locals felt they could afford their own trainers. Changing the culture will be difficult unless the value of the training is clear.

## Stage Four: Work Experience and Advancement

Alfred North Whitehead once said, 'No language can be anything but elliptical, requiring a leap of imagination to understand its meaning in its relevance to immediate experience.' Nothing is meaningful until it is related to the hearer's own experience. One may hear the words, one may even remember them and repeat them, as a computer does in the retrieval process. But *meaning*, a growth in experience as a result of receiving the communication, requires that the hearer supply the imaginative link from the listener's fund of experience to the abstract language symbols the speaker

has used. As a leader (including teacher, coach, administrator), one must have facility in tempting the hearer into that leap of imagination that connects the verbal concept to the hearer's own experience.<sup>73</sup>

-- Robert Greenleaf

The most common union approach to mastering a union role is to learn by doing, without much help or encouragement from anyone, and without formal training. While many of today's top labor leaders mastered their leadership skills this way, it is certainly the hardest way to learn. It is particularly difficult for those without a mentor or a support network.

The best training consists of experiential learning, or guided work experience. It should incorporate diverse responsibilities to expand the leader's capacities. It should include exposure to a variety of leadership styles so the new leader does not think there is only one way to do things. Each person needs to see leaders she or he can imagine becoming, which speaks again to the need for mentors, guides, and diverse long-term trainers. The most powerful learning comes from real struggles and from success. But union leaders must also learn from failure, and imagine better ways to do things. Formal training is most helpful if it is tied to a real work assignment, if it is prepared for and followed up, and if it incorporates the experience of those being trained. Good supervision is essential. Unions must do more to train trainers.

When asked what the Organizing Institute was doing to train new organizers, director Richard Bensinger responded: "We are basically trying to match up good people with good people. We have little to do with the actual experience they get, but we do discuss and debrief it with the trainee and the trainer."<sup>74</sup> In a 1987 effort to train minority field staff, the SEIU Field Services department developed an elaborate internship/apprenticeship program which lasted a year and involved six weeks of headquarters training and orientation and one or two field assignments with weekly objectives, check-ins, evaluations, and reports. While the effort certainly focused intently on the six people enrolled in the program, it proved too costly and too small-scale to continue at the time. Today the SEIU is considering adapting and restructuring the intern program as part of its more sophisticated leadership development initiative.<sup>75</sup>

Formal training is important as part of overall leadership development, but it must be integrated into real experience. The qualities of good experiential training, at work as well as in the classroom, include the following

- Clear objectives and goals, based on real needs-- first tactical, then strategic
- Participatory and respectful of learners' experience
- Culturally conscious and non-sexist, non-racist
- Rooted in values, vision, and goals of the union movement
- Having a realistic assessment of union problems and strategy for possible solutions
- Providing clear and specific feedback to participants
- Having a follow-up component based on real work assignments and applying the skills, knowledge, or attitudes gained at the training.
- Part of an ongoing training and development program, not just one event
- Accessible - whether in language, techniques, location, cost, child care, etc.
- Resonant with the learner's real experience-- on the job or in the union

### Combination Work and Experience Training

The best approach combines formal and informal training with on-the-job experience which provides appropriate and increasing challenges for the developing leader. This could be viewed in the context of a great labor tradition-- the apprenticeship program. Harvard professor Howard Gardner, when writing about the US educational system, explains the advantages of apprenticeship in a way which can also be applied to union training programs. He points out that learning is heavily "contextualized" in apprenticeships; the reasons for it are clear and the product is important. Also, the learner has the opportunity to work with a master, both to create personal bonds and see someone who excels at work, There are clearly defined steps to competency, with interim steps of accomplishment. 'The goals are clear, because real work is involved and produced.

This in itself creates an exciting and motivating environment. And peers and others of varying levels of mastery can help and the apprentices can instruct each other.<sup>80</sup> But his most compelling argument is that apprenticeship provides the best kind of learning for certain complex skills because, as Michael Polanyi noted, " the apprentice unconsciously picks up the rules of the art, including those which are not explicitly known to the master himself (sic). These hidden rules can be assimilated only by a person who surrenders himself to that extent uncritically to the imitation of another."<sup>81</sup>

This is particularly compelling because there are such diverse responsibilities involved in union leadership---a range from administrative to entrepreneurial to participatory to legal to political skills are all required, plus the ability to balance them and exercise them at the right times. It is most difficult, if not impossible, to capture them in a formal training program. But with close supervision and immediate feedback, and with an understanding that it takes years to develop leadership skills at a highly sophisticated level, the apprenticeship model is very powerful and attractive. In addition, union leaders need a commitment to lifelong and continuous learning. Generally, the apprenticeship model can serve at many levels-- from steward to local president to staff to regional officer.

The problem is most acute at the top of organizations, where apprenticeships are seldom served for the right length of time and in the right atmosphere.<sup>82</sup> Finally, it is rare that anyone in the labor movement has extensive experience with progressive management or supervisory skills. This problem has received more attention in recent years during the meetings of chiefs of staff of major unions. They discuss administrative and managerial issues including training, strategic planning, and budget decisions. SEIU has set up a special department called Local Union Services to work with high-level local officers on administrative issues. In some cases it simply brings them together to share experience and problems.

Another important area of work experience is the quality of supervision and mentorship offered by union leaders. Ideally, each staff member should have a staff development plan; this is a harder concept to implement with elected leaders, who are sometimes reluctant to request



development or training for fear of exhibiting weakness or vulnerability. A key lesson of any work experience is learning about union politics. Lois Gray quotes the leaders she interviewed as saying that "women lack the political know-how and stick-to-itiveness required to line up support for themselves and other female candidates."<sup>83</sup> And many union women say they don't like politics. One senior union staff says, "I tell them they're in the wrong place. Unions are political institutions."

Politics is not all a matter of skill. The playing field is not the same level for everyone.

Teamsters leader Clara Day describes some of the obstacles:

I think what makes the most difference is that networking with the leadership of any job, who most times are male and white. There is the stopping by the bars, or the stopping by the card game, and they get to know these people, or they get to feel responsible for the ones they stop out with or the ones they drink with or play cards with- And I guess it's deliberate, but not necessarily, working for the friends.<sup>84</sup>

Future union leaders will need to learn how to win elections if they are to be successful. One issue which has not been addressed systematically by unions is how to provide them with the skills and support to learn the political rules of the game. Many learn, again mostly through informal routes.

An important issue in work experience and advancement is integrating family commitments with job and union commitments. Most women activists are also mothers, but sociologist Pam Roby's recent study showed that only 25% of women stewards in her sample lived with partner and children, while 66% of men stewards did. In other words, the presence of a partner or children lowers women's level of participation, and raises men's. Roby also found that women handled increased union responsibility by cutting back on their sleep or housework, while men usually cut back on recreation (Knights of Columbus or watching TV, for example).<sup>85</sup> In the absence of a domestic revolution increasing egalitarian family responsibilities, unions have to provide concrete support for women leaders. The efforts to provide child care at meetings and conferences, to schedule meetings during working hours, to make union activities more

family-oriented, and to win more paid release time are all important endeavors. They have not resolved the problems, but they can help tremendously. Nonetheless, a number of studies suggest that time in itself is not the major reason why women have not reached higher leadership positions, because they do perform a great deal of volunteer work, for the union and in other community endeavors.<sup>86</sup>

Getting experience in diverse aspects of union work is very important. Becoming visible, through achieving success or broader leadership roles in the labor community or broader community, is also important. Taking responsibility for leading a meaningful activity, whether an organizing drive, contract campaign, strike, or political campaign, is essential to developing confidence, skill and a positive reputation. This in turn can lead to other opportunities. Seeking and performing management roles within the union, however contradictory it may seem, especially to women, is also important to learning how to lead staff. Of course, this is more likely to occur in growing unions rather than shrinking ones; more opportunity will lead to more leadership roles.

Nearly every leader taking on a major new responsibility feels unprepared, and often with good reason. This is especially true of national leadership roles. Changing the culture which requires leaders to appear invulnerable and infallible is an important step. Union leader Bob Wages is a good example of someone who, when asked why he is president, says, "Because 90,000 people said, 'Lead us out of this shit!'" He describes learning his organizing skills in the anti-war movement and the student movement, and learning about the oil industry as a local leader. "I hated their arrogance, wealth and power... I figured the more knowledge I had, the better off I was at dealing with them."<sup>87</sup> But he had no explicit training for running the union, although he did serve as a vice-president for eight years before becoming president. It is hard for the top union leaders to ask for help, because they are supposed to be the best, and to know how to lead, and not to show any weakness. In fact, by the time they are president, they have usually served for years at training others, even if they have had no training themselves. This brings us to the last stage of leadership development, "leading" or "passing it on. "

## Stage FIVE: Passing It On

When asked how they learned their jobs, many union leaders will say, "at the school of hard knocks." And they are sometimes the leaders most resistant to new training programs. But an equal number will remember someone who trained or taught them the ropes, whether a family member, a local leader, an international rep, or a national leader. This fifth and critical stage in each leader's development is when she finds herself training and developing others, giving back some of the skills and knowledge she has acquired. Ideally, this should happen early in her experience so it is not a strange phenomenon, since this needs to occur at all levels of union leadership, beginning with stewards.

When asked what they were currently doing to contribute to the training and development of new leaders, the 80 surveyed leaders gave a variety of responses. Many described engaging in formal training of leadership skills with the committee members and local members who were their constituents. One UAW Vice President summarized the excitement of helping others succeed this way:

Educational conferences-- educating--recruiting-- watching and listening and being there to show them to right door-- the biggest thrill is watching that door open and they walk through it. Yes!

Several leaders spoke of giving up office so others could assume leadership roles; a Steelworker described delegating responsibilities so "they could prove to themselves that they can achieve the leader job." The connection with organizing re-emerged with a UFCW rep who said he "formed volunteer organizing committees" to develop leaders. One AFT leader said she had established a union master's degree program for local members in educational leadership, which includes skills needed to be leaders at the worksite. Another had established an education scholarship for members. Still others talked about being a mentor to less experienced members.

Guided experience emerged from several descriptions; one public employee said, "Helping train new stewards by taking them into grievance meetings with management to demystify the process." A Newspaper Guild local president said, "involving newspaper workers in the problem of repetitive strain injury-- through workshops, developing a video, and bargaining for new equipment and furniture." One retired AFT local officer said, "I try to be a good role model, yet let women discover how to do things themselves." And there are many variations on these themes.

The lesson seems to be that once in leadership roles, at least at these middle levels, many leaders are consciously striving to train and develop other leaders. But the problems they encounter seem to be a lack of resources, time, and guidance from leaders above them. When asked what support they needed to continue their leadership development, there were many emphatic requests for more training, particularly in planning, communication, motivating people, time management and interpersonal relations. Some listed problems with reading, or with resistance from other union leaders. A few wanted bargaining and legal skills, and public speaking and public relations were high on the lists. And some admitted to needing more confidence and emotional support, which are not directly provided by training classes, but can be part of an overall leadership development program. Almost no one thought he or she needed training in organizing, or in the values and vision of the labor movement, or the problems of the current economy and his or her industry.

A valuable form of "passing it on" is to participate in and then to lead a strategic planning process. Michael Maccoby describes the AFT "Futures Committee" as a place where union leaders from around the country and from many different divisions are challenged to think through the overall common goals of the union as a whole in light of the situation in schools, universities, public institutions and healthcare facilities and the diverse membership. They learn to evaluate the environment, their opportunities, and their strengths and weaknesses. And they are forced in the process to articulate the values and vision of their union, and to take ownership of its future. When this experience is repeated at regional and local levels, the skills to lead it are learned by the

leaders themselves. And the membership around the country is strengthened by coming to support a common mission and goals statement.

Other ways to "pass it on" are to become a manager, and to take on leadership roles where one's responsibility is to develop other leaders. Opportunities to teach are available through the women's schools and other leadership programs. Volunteer and community activities are good ways to expand leadership skills and to spread the word of the labor movement. Very often, leaders come to this stage after their children are grown and they have more time available. But even in small ways, one can learn to think of oneself as both a teacher and a learner early in one's union leadership role. The culture of "continuous learning" which HUCTW has adopted encourages their activists to do this, as will be demonstrated below.

### Summary and Conclusions: The Five Stages

The difficulty of disentangling the five stages (entry, orientation, training, work experience, and passing it on) suggests the complex interaction between work and learning. This research suggests that people's leadership style, values, and beliefs are shaped early, especially by the circumstances of their recruitment into leadership and by their initial experience in the union. It is difficult but not impossible to reverse those experiences if they are negative. For example, one African-American woman who is emerging into leadership with the help of a conscious mentoring program by SEIU Local 285 has been a member of two other unions previously in her twenty-year nurse's aide career. But in neither case did leaders or staff recognize her obvious talent or encourage her to become active. She has been a leader in her family of 12 siblings as well as an informal leader among her co-workers for many years, but only after many years of work is the union "discovering" and nurturing her talent through its conscious leadership development program, which is especially focused on identifying women and men of color as future leaders. While this is only one example, it could be repeated many times over.

The intertwined lessons of training and work experience require a great deal of sorting out to create a leadership program which draws on work experience and offers training which is resonant with it, and relevant to it. By the time someone is at the stage of "passing it on," his or her leadership style is quite developed, but there is always room for more learning. The final section of this paper is a short study of the Harvard Union of Clerical and Technical Workers (HUCTW), AFSCME, focusing on its approach to leadership development.

## PART FOUR : HUCTW'S LEADERSHIP DEVELOPMENT

### Introduction: The Development of a Participatory Culture

The Harvard Union of Clerical and Technical Workers (HUCTW), AFSCME, is a local of 3500 members which is currently negotiating its second contract with Harvard University. The union organizing drive which resulted in this local extended over 17 years, beginning in the Medical area, and expanding to the entire campus as the result of the university's effort to enlarge the bargaining unit beyond what it thought the union would be able to organize successfully. The union members are 85% women, and the leader who is central to the organizing and development of the union is Kris Rondeau, a 39-year old former Harvard technician who became a full-time union organizer in 1979. The group was independent in the early years, then affiliated with UAW's District 65 in 1980 and the UAW New England region after the expansion of the bargaining unit.<sup>88</sup>

In 1985 the organizers left the UAW over a clear split in direction and strategy as well as the UAW's plans to transfer leaders Rondeau and Marie Manna "indefinitely" to another organizing drive. The disagreements centered around the UAW's traditional approach to organizing. Manna says:

They did not understand the way we were organizing. They were more traditional, they wanted to tell people how wonderful the UAW was, and how the union would take care of them. They wanted to focus on all the things the union has done.

And we knew that wouldn't work. And it was also not what we wanted to do.<sup>89</sup>

The Harvard employee organizers had developed a contrasting, empowering notion of the union as a vehicle through the workers could take control of their own work lives and build community at work. Their strategy of organizing emphasized leadership development, one-to-one contact and "team" organizing. Organizer Manna says:

All along, there was a wonderful mesh between the gut level "what's right" and the practical "what's needed" from a methodical sense. To build the local and win the election, there wasn't a conflict between doing what would work and what was the right thing. They were the same.<sup>90</sup>

The approach to organizing which the eight organizers, some newly resigned from Harvard, developed during their eighteen months as a financially struggling independent organizing committee continued to focus on empowerment, leadership development and clear values of caring and community. The organizers, three of whom were men, took an approach which Manna identifies with traditional women's values:

They style comes from what you're taught as a woman, growing up. It is a personal style of organizing. People pay attention to the relationships being built... You take the time to talk to each other, and listen to each other, hopefully. I think it's a very feminine style of organizing! We care about each other's issues. It's not just about "me," what I can get for me. And of course that's not just male, but it's more male than female... We build on the positive values.<sup>91</sup>

This approach really describes good organizing with an empowerment focus. And the group was careful with its use of "feminist" language. But the women's movement definitely had an impact on the organizers and the work they later read resonated with their own experience and their strategy of empowerment.

In retrospect, the union's strong culture, emphasis on values, and the vision of a caring community with everyone's voice heard became solidified during those eighteen difficult months. Rondeau recalls:

A bunch of us really decided what kind of world we wanted to live in-- and to at least try to build that for ourselves and as many people as possible... The most interesting things happened to us when we became independent. We had nothing.

There were eight of us. We worked for nothing for a year and a half. We hired people to work for nothing. Stephanie, Bill, Joey, and Ralph all came on at that time. What an incredible thing, to leave your job and go to work for the union without a paycheck. That tied us together. We raised our own money...

We were free. We had nothing, we were scared all the time, but we felt the best we ever had. It was their absence [UAW District 65]. They were not really trying to tell us what to do, but it felt like trying to merge your culture to blend with theirs. They were real different... We stopped organizing around issues. We stopped organizing against the boss after that. We wanted power and participation. The union was an educational organization. It was wildly broad, like a cultural and social organization.

You know on an organizing drive, when people on the committee start dating and getting married? You know it's a winner. It was like that... We had read about unions in Europe, being part of the social fabric. That's what we wanted.<sup>42</sup>

When Rondeau refers to not organizing around issues, she means putting specific economic demands in the background in favor of the broader values the union sought to realize at Harvard. The organizers tell the story of demanding a dental plan for employees during the organizing drive. Soon Harvard implemented a dental plan. They realized that Harvard could give specific economic benefits, but could not give recognition of co-determination and employee participation which would speak to the dignity and sense of community empowerment they were organizing to achieve. So they focused on the value of building the union as a community of self-respecting workers taking control of their lives. "We are sure no Harvard administrator or professor would ever abdicate a right to participate in decision making, and we can no longer afford to give up that right ourselves," they wrote in their statement of principles, "We Believe In Ourselves." It did not mean economic improvements were unimportant, but they were not the centerpiece or focus of organizing.

In January 1987, the financially struggling HUCTW made an agreement to affiliate with AFSCME, which offered to support the organizing drive without trying to control it.<sup>93</sup> Union president Donnene Williams, on full-time leave from her job with Harvard, says:

AFSCME took a big risk with us. Because we said, look, just give us the money we need and leave us alone. We don't want you to send organizers or negotiators or anybody. We want to do it ourselves. And we won, and we got a good contract. And they got lots of attention because it was Harvard. And it was also one of the cheapest organizing drives they ever had, because we didn't use any stuff [flyers, buttons,



and other union paraphernalia]. All of it went to staff salaries.<sup>94</sup>

In thinking about organizing in the labor movement, it is important to note that both the original \$500,000 subsidy and subsequent financial support of HUCTW represents a conscious decision of top AFSCME leaders to allocate resources from current dues-paying members to support new organizing. While the HUCTW members are now dues-paying AFSCME members themselves, the national will not "break even" for a long time, if ever. But their choice to affiliate with HUCTW was still a good decision for them to make.

The union advanced five principles for organizing in a document entitled "Working Together," calling for:

- resolution of problems through cooperation and mutual respect
- employee self-representation and participation in decision-making
- full utilization of employees' knowledge and experience where possible
- removal of economic and social barriers to working women's success
- just compensation and recognition for long-term employees.<sup>95</sup>

However, the university was not convinced that the unionization of white-collar employees would not harm its interests, and management ran a strong anti-union campaign. A letter from Derek Bok complained that " the union has had three years to communicate its message in countless different settings, while the university has confined its campaign to three months." The Harvard Business School case notes that " the administration had to contend not only with 16 full-time union organizers but also a virtual army of volunteer organizers estimated at 240. Many observers noted the 'moral fervor' of these volunteers, something the administration found difficult to counter."<sup>96</sup> HUCTW organizers' volunteer program and leadership development were at work!

The union won the election at Harvard on May 17, 1988 (1,530-1,486). The university appealed the "election day conduct" to the National Labor Relations Board over a six-month period, but finally agreed to recognize the union on November 4, 1988 after losing its case at the

regional level of the NLRB. A formal set of "transition talks" was begun between the parties with chief bargainer John Dunlop leading the university's team, and Rondeau leading a union team composed of 85 university employees who participated in various committees. This is an unusually large number of members to involve in negotiations, again in keeping with the union's participatory culture and focus on shared decision-making and leadership. The union maintained its organizing committee structure throughout negotiations.

The first contract was finally signed October 12, 1989, but was effective July 1, 1989 through June 30, 1992. It provided for substantial economic benefits, including pension improvements and wage scale upgrades as well as raises, tuition plan reductions, and many other changes. It is also a model of cooperative union-management relations, based on a strong relationship emphasizing mutual respect and decentralized decision-making and problem-solving. There is extensive employee and manager participation through Joint Councils in each major work area. The union is now bargaining its second contract, in harder economic times and with new management negotiators.

## HUCTW's Leadership Development and its Importance

The Harvard agreement holds potential lessons for many union leaders and organizers. While no one would suggest that Harvard is even a typical university workplace, the workers are predominantly working women in largely unorganized classifications. One in five women workers in the US today is a secretary, according to reports. And HUCTW organizers claim their program has generated an extremely positive response among its members. They are now collecting a total of 3,000 signatures for their bargaining "poster," a goal which requires the leaders and staff to talk to nearly every one of the 3,500 workers in the unit.

The next section will focus on the leadership development which HUCTW undertakes on a daily basis, and which its leaders conceive as part of their mission. It should already be obvious that HUCTW organizes not only around economic issues, but around broader values and visions-

employee participation and voice at the workplace, community, caring, empowerment, and respect for each person's potential and concerns. In addition, HUCTW views organizing, both in its "already organized" workplaces and in new workplaces, as central to its mission and to leadership development. So it is one example of "transformational leadership" which could truly reshape the American labor movement if widely adopted.

## Views of Leaders

HUCTW leaders and staff have a very clear and non-traditional notion of leadership. When asked to describe leadership development within HUCTW, organizer Marie Manna says:

It's partly having no rigid idea of what a leader is. We're looking at everybody as a potential leader. And we see who develops, who has potential, and we intensify the organizing style. We pay a lot of attention. A whole lot of attention. We listen really hard. And we meet regularly with them, I guess I would say we nurture them, to build that confidence, so they would think they could be a leader. It takes a lot of time and effort. It's not just "learn these three skills." It's much more personal.

Her description of leaders developing other leaders demonstrates that both the "target" of the development and the one doing the developing are learning leadership skills.

I guess our challenge was looking at people who hadn't been seen as leaders because they didn't have confidence, and not pointing that out to them, but the leader or organizer taking responsibility to work with them, support them, and encourage them. People have the ability, and they need support. Even now, it's still difficult for many women to take on leadership roles. We called them activists. They seemed comfortable with that.<sup>97</sup>

The union focused on personal empowerment of its members, overcoming the inner and outer voices which told them they were not powerful or worthy of being "in charge" of their lives. One union member who became an activist in the union describes her experience:

I was used to being a passive female worker that just had my decisions made for me and so far they seemed to be ok...[the organizers said] you have no say in what they (the employer) do. You can't have a voice in deciding what happens to you, even something as simple as your schedule. We need a union so you can take responsibility for your own life... Now... I don't see myself as somebody who's helpless anymore. I feel like I can

make choices. I feel now like I'm designing my own life. Like I'm the architect of my life. Before Harvard was the architect.<sup>98</sup>

The union also focused its culture on continuous learning, both within the workplace and in union activities. It became a theme for people's lives. The same activist says:

So training, and just constantly learning is one of the main mottos of the union. No one should just be stuck or... You don't just stop learning when you graduate from high school, or get your final college degree. And there's this sense in the workplace that ... people just don't learn any more, they just become a kind of cog in the wheel. Just learn their job, the irreducible minimum to do their job, and that's it. And we're just dead set against that. Not just in union skills, but in the job itself. We just think that people should be constantly expanding, and maybe moving sideways rather than up all the time.<sup>99</sup>

The union also consciously develops leaders in every level of activity. This is a strategy born out of necessity and similarly carried out by the United Farm Workers, which found itself confronted constantly with the need to train new leaders and volunteer staff because of the rapid turnover. Therefore every organizing drive, every contract, every protest had to be structured as a training activity. This gradually became part of the union culture, which then became a leadership development structure; and it also resonated with the values and vision of the founders.<sup>100</sup> The Harvard union has high turnover too, and has tried to turn that reality into an advantage: "We constantly have new leaders in the organization. Some of it is because of turnover, but also because people's lives change. We understand that, it's OK... We're flexible, that's how we avoid burnout... That's why we have to constantly be recruiting more leaders. Women especially have this problem because they have more responsibility for everything, at home and at work... You can't have enough people organizing."<sup>101</sup>

In HUCTW, the training and leadership development come together in a form of "guided experience." It is a very conscious and open strategy, not hidden or manipulative. One activist explained what it felt like to her:

They do this thing they call 'shaping your experience.' So they put you in situations where you're set up to succeed to some degree or another, and then they're like "Wow, you did this really well, really really well. They do a lot of positive reinforcement, and then they say, "you were great at this. Want to think about being on this committee? until you realize, Gee, I'm doing stuff I never thought I would do

a year ago ... They just watch people really carefully, and they have a sense of who can be developed, and it has nothing to do with macho leadership stuff. Some of the people they picked to go on the negotiating team, you'd just think of as shrinking violets.<sup>102</sup>

Donnene Williams explains how the process works from the perspective of the organizers, whether staff or rank-and-file.

The union is based completely on organizing committees. There are about thirty-five. The organizing committee is volunteer activists, of varying levels of sophistication, involvement and understanding. It includes Joint Council members, union reps, newly active people, and activists with no title-- who don't want to have a formal role in the structure; but want to be involved... We meet once a week at lunch, and talk about what's going on. For instance, if there's a new employee, we would figure out who would ask her to lunch, did she get a new employee packet, who we could bring along to lunch who needs some more development. We might go through the building list. We talk about organizing in general, in the school and in the university.... We also talk about what's coming up next. We get ideas.

This is really where leadership development happens. It's the first step of involvement. This may sound weird, but people don't just come to the organizing committee meetings. They are 'picked.' For instance, there's someone at the School of Public Health named Janie. She's new. I see something in her. I may invite her along to an orientation meeting, where I'm meeting with a new staff person, to get to know her better and get her a little more involved.

Then too the organizing committee meetings are fun. We may spend half the meeting talking about someone's birthday or wedding or... there has to be a social part to it.<sup>103</sup>

There are many other unique facets to HUCTW : its non-hierarchical "circular" structure, its focus on consensus decision-making, its determination to solve problems on an individual basis rather than focusing on precedent, its emphasis on "moral reasoning" as a principle for bargaining with management, and its commitment to organizing new workers. While limitations of space do not permit exploration of all of them, the union's culture is intricately woven for consistency in "beliefs" and "actions," as described by Marie Manna. And its focus on leadership development, values and vision, and new organizing are exactly the kind of emphases which could inspire the future of US labor unions.

There are also unanswered questions: How much of the strength of the union's culture and organization is due to the long commitment of a tight core of talented organizers who shared

important values and Harvard work experience as well as eighteen months of bonding through mutual sacrifice? What would have happened if the university had not reversed its open hostility to the union rather than opening a "new chapter ... to make this relationship as harmonious as possible?" Will the evangelical, unified spirit of the union be able to sustain internal conflict and dissent? How will the union manage its transition from anew to an established organization over time, particularly with financial pressures to reduce its high staff-member ratio increasing? And what are the implications for new organizing drives such as those now underway at different kinds of colleges and universities, and for labor in the broader sense? HUCTW leaders have not been active participants in other Boston-based efforts to build women's leadership skills-- why not?

These are questions that need to be seriously addressed in a longer study. The union leaders have some answers. When asked about leaders getting out of touch with members, Donnene Williams says:

The union itself doesn't tolerate entrenched leaders. We don't have people with a title who aren't doing the job. Because we do a lot of talking and organizing, we don't tolerate out of touch leaders. They wouldn't be re-elected if they weren't talking with people. You can't shine it on. All of us came up gradually, with someone encouraging us.<sup>104</sup>

She also has a long-term view on the labor movement. "I have hope. I believe in what we're doing here, but I'm reluctant to criticize other unions... The change that's needed is huge, and it won't happen overnight." The union members and staff have helped AFSCME win other important clerical elections, at the University of Minnesota and the University of Illinois. And now Kris and others are leading new organizing drives in the area which HUCTW is directing.

The emphasis on team-building and creating a safe environment, as well as staying in touch with the membership base, is played out in how these new drives are structured. Most staff assigned to them work part-time with new organizing, and part-time with the Harvard union itself. Thus they stay in touch with the HUCTW "team" and base, and their experience with new organizing can be carefully de-briefed with experienced staff. This is the kind of integration of training, leadership development, and organizing which is found too seldom in today's labor

movement. And while the presence of key talented leaders has obviously been of critical importance, one implication is that more opportunities need to be identified and created within labor to support leaders like these.

## Summary: HUCTW

The lessons of HUCTW are clear: a full-time focus on empowerment as the basic goal yields lots of new leaders. The staff estimates about 350 or 400 Harvard workers are actively involved in union volunteer work, which is a very high 10-11 % of the membership-- the equivalent of one "steward" for each 10 workers, instead of the 150 suggested earlier as a labor movement average. The leaders estimate only 25 to 30% of the union's time is spent on "problem-solving," what other unions call "grievances" and which consume closer to 60% of many local union's staff time. The rest of the time is spent in organizing and joint council work on developing workplace policy and participation. The mixture of formal and informal training described above is a constant part of the union's culture of "continuous learning," which is in itself empowering. There is no myth that the leaders know everything or need to know everything- because they are learning too. The focus is on experience, and learning from experience, and overcoming bad experience and fears through successful, positive, and shared victories. This is consistent with the notion of "transformational leadership" described in Part One, where leaders and members are mutually energized by their interaction. "The learner also teaches," says Kris Rondeau. HUCTW presents an impressive case study of what is possible in a union based on the goal of empowerment which focuses on leadership development both to achieve its mission and as part of that mission.

## CONCLUSIONS

The conclusions to be drawn from this research are clear. Leadership development, new organizing, and a clearly articulated mission of empowerment and long-term goals are critical to the future of the labor movement.



First, labor unions are widely seen as "special interest" groups which institutionalize self-interest. Yet the best core values in the labor tradition are communitarian, egalitarian, empowering and based on social and economic justice.<sup>105</sup> Narrowly self-interested, defensive, and reactive unions can only hope to lessen the blows for their current members, but there is a real danger that someday all that will remain of them will be empty buildings and pension funds, but no members. Progressive unions which can articulate a goals for the present and a vision for the future, such as HUCTW does for its members, and such as the UAW, 1199, and the Farmworkers have done in the past, need to do so loudly and clearly.

"People organize around solutions, not around problems," argues Marshall Ganz. Unions need to have a realistic but optimistic plan and vision for the future, a vision which can mobilize the organized and the unorganized to action to achieve it. The problems of "apathy," and "cynicism" so lamented in US politics and in some unions, arise from a deep sense of disempowerment which should be the basis for union organizing. After all, unions are all about empowering the disempowered. Working people can be inspired by a 1990s version of the CIO's call to action:

We, the clerical and technical workers of Harvard University, have joined together to form a strong Union. The strength of our Union lies in the desire and ability of each member to view our work lives not only as a responsibility to our workplace, but also as an opportunity to contribute to the economic and personal well-being of our co-workers. Our Union is firmly rooted in the idea that talking and listening to each other with respect and kindness is the best way to ensure participation. We build our Union by knowing and caring about each other's lives and issues, and we are strengthened by the unity that develops from our trust...

- Preamble of the By-Laws of the Harvard Union of  
Clerical and Technical Workers Union  
(HUCTW), AFSCME, AFL-CIO

Nearly every union contains within its constitution, usually in its preamble, some statement of the vision of the founders. Not every union does so well at repeating the mission statement in its daily work and organizing lives as HUCTW, but some do. The first step in labor's revitalization is to re-articulate and update the social and economic visions of the founders, particularly empowerment, and talk about them at every level of the union. This can be done

through strategic planning, in today's parlance, or in a variety of other ways. Only if union members and leaders share a common conception of the mission and goals of the union will there be a sound basis to take the second necessary step.

That second step is to recommit fully to organizing the unorganized, particularly in the growing sectors of the economy and among women, minorities, and new immigrants, at all levels--skilled, semiskilled, and "unskilled." In the Ganz and Washburn study of all the unions in California in 1984, they found that if all expenditures were put together, the unions spent \$0.98 of each dues dollar on serving and representing the organized members, and \$0.02 of each dollar on organizing the unorganized. While this is politically quite understandable (unorganized workers don't vote), it is a suicidal course. Without growing, unions will die-- or become irrelevant. They cannot achieve their social goals, nor their economic ones. Unions already spend significant resources in legislative struggles to advance the interests of all workers, whether members or not. They need to organize those workers to contribute to advancing their own interests, and to have a broader base.

No one ever said organizing is easy. Hard economic times arguably make it harder, yet even now unions win a majority of all elections where women are predominant in the workforce, especially if they have women organizers. The same is true of minority-dominated workforces. The SEIU Justice for Janitors organizing program, the AFSCME and CWA public sector organizing programs, the UFCW organizing efforts, the OCAW petition drives, and some others certainly all deserve commendation-- but they are not enough. Organizing must be a strategy, not just a tactic. The labor movement cannot lament the lack of labor law reform indefinitely; it must seek alternate ways to sign up workers and win contracts until it is strong enough to win laws to protect workers' rights to organize. All this is easier said than done, of course, but more unions need to make the kind of organizing set-asides that the OCAW has done (the 10% level) or higher. Resources are a true test of an organization's commitment to its goals, and unions are no exception. The best talent in the labor movement needs to refocus attention on organizing.

Of course, the existing 16.6 million members need strong representation at the same time, and the laws are getting stricter, and union finances are getting more complicated, and contract settlements are worse-- which brings us to the third major step unions need to take: continuing, ongoing, formal and informal, consciously guided leadership development and training. The HUCTW model needs to be shared through the labor movement as union staff and leaders are re-trained and re-inspired to continually organize within an organized unit. Better formal training programs, particularly in new technology and new management practices and theories, and much more sophisticated use of apprenticeships, internships, mentorships and all kinds of leadership support programs are vitally needed. They must be inclusive of women and persons of color, and they must reflect a kind of leadership which will work in today's world: empowering, transformative, relational leadership. While there are many styles with which this leadership can be exercised, the key qualities are the same.

Appendix E contains specific recommendations for a comprehensive leadership development program (though some are described as women's leadership programs, they can be expanded to include all new leaders). The kind of programs this research supports are described in more detail in this document.

The labor movement should be one of the most exciting places for idealistic people of all ages to invest their energy for progressive social change. It has a solid membership and significant resource base, a long and proud history of sustaining workers' rights, and many committed, talented leaders and members. For each union leader interviewed for this study, I have names of six or seven others who were considered exemplary by their members or fellow unionists. But today an air of hopelessness, pessimism, and defensiveness pervades many unions, whose members and leaders are suffering from the recession and the loss of dreams and benefits built over many years. The only way out of this despair is to strive for a vision of hope which reflects labor's highest values, to organize new members who desperately need representation and collective voice, and to welcome and support the new leaders that new organizing drives will produce.

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<sup>1</sup> CIO constitution, 1938, excerpted by John Dunlop in The Management of Labor Unions (Lexington, MA: Lexington Books, 1990), pp. 140-141.

<sup>2</sup> Knights of Labor constitution, quoted in John Dunlop, pp. 141-142.

<sup>3</sup> Unless otherwise noted, overall union statistics are taken from the US Department of Labor, Bureau of Labor Statistics, "Union Members in 1991," Washington, DC: USDL Publication 92-61, February 10, 1992.

<sup>4</sup> See Tom Kochan, Harry Katz, and Robert McKersie, The Transformation of American Industrial Relations (NY: Basic Books, 1986) for an excellent start.

<sup>5</sup> See John Gardner, On Leadership (NY: The Free Press, 1990).

<sup>6</sup> For a good summary, see Joseph C. Rost, Leadership for the twenty-First Century (NY: Praeger, 1991), especially chapters 1 and 2, and Gardner, cited above. See also, Lee Bolman and Terrence Deal, Reframing Organizations, (Jossey-Bass, San Francisco, 1991), especially Chapter 20. See also Michael Maccoby, Why Work (NY: Simon and Schuster, 1988), and The Leader (NY: Simon and Schuster, 1981). See also the work of Ron Heifetz, summarized in part in Ron I Heifetz and Riley Sinder, "Political Leadership: Managing the Public's Problem Solving," in Robert Reich, ed., The Power of Public Idea, (Cambridge, Ma: Harvard University Press, 1990),

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pp. 179-203. There are many other texts cited in these works and I have drawn this necessarily brief summary from several of them.

<sup>7</sup> Michael Maccoby, The Leader ( NY: Simon and Schuster, 1981). See especially Chapter 10, pp. 219-237 as well as the individual profiles.

<sup>8</sup> See Peter Drucker, "What Businesses Can Learn from Nonprofits," Harvard Business Review, July-August 1989, pp. 88-93. . See also Judy Rosener, "Ways Women Lead, Harvard Business Review, November-December 1990, pp. 119-125, and the many responses in the following issue.

<sup>9</sup> See Harry Boyte and Sara Evans, Free Spaces ( NY: Harper and Row, 1986), p. 62.

<sup>10</sup> Cletus Daniel, "Cesar Chavez and the Unionization of California Farm Worker," in Melvyn Dubofsky and Warren Van Tine, eds., Labor Leaders in America (Chicago: University of Illinois Press, 1987), p. 361.

<sup>11</sup> See James McGregor Burns, Leadership , (NY: Harper, ,1976).

<sup>12</sup> Burns, p. 20.

<sup>13</sup> Burns, p. 43.

<sup>14</sup> See Jean Baker Miller, A New Psychology of Women (Boston: Beacon Press, 1986) , and also Judith V. Jordan, et al-, Women's Growth in Connection: Writings from the Stone Center, (NY: The Guilford Press, 1991), especially Chapters 1 and 11.

<sup>15</sup> Miller, A New Psychology of Women, p.,x.

<sup>16</sup> Miller, "Women and Power," in Jordan, et al., p. 199.

<sup>17</sup> In unions, leadership is very dispersed and sometimes less than clear. The elected leaders of a local or International union are most clearly its leaders, and they play a unique role politically and programmatically. But union staff also play a leadership role when they are organizing or representing workers, or designing programs and determining resource priorities, and their role is less well defined. Also, appointed union officers often act as leaders. Elected full-time union leaders are in the most key position to make changes, since they have a defined base and responsibility for policy as well as program work.

On a stylistic point, I will use "she" and "he or she" interchangeably in this paper to include both men and women as leaders. When "she" is used, it should be taken to include men unless the context indicates otherwise.

<sup>18</sup> Interviews with Donnene Williams, January 3 and April 8, 1992.

<sup>19</sup> From the "New Employee Packet" provided by HUCTW staff, December, 1991.

<sup>20</sup> Interview with Donnene Williams, January 3, 1992.

<sup>21</sup> I am indebted to Michael Maccoby for this concept.

<sup>22</sup> Michael Maccoby, "The Corporation as a Part-Culture," paper delivered to the American Association of the Advancement of Science, Philadelphia, PA., May 28, 1986, revised February 25, 1992, p. 3. See also Maccoby, Why Work(1988).

<sup>23</sup> I will use "national" and "international" union interchangeably in this text, referring to US-based unions in the AFL-CIO or major independent unions, some of which have members in Canada and are therefore are "international unions." I am speaking of the national and international organizations here, and I believe all of the headquarters are located in the United States.

<sup>24</sup> But 50 AFL-CIO unions have less than 50,000 members, and another 30 have between 50,000 and 100,000, according to the AFL-CIO's own report The Changing Situation of Workers and Their Unions (Washington, DC: AFL-CIO, 1985).

<sup>25</sup> Some of the largest organizations, like the National Education Association, have statewide leaders in nearly every state who would fall into this category, but they are the exception.

<sup>26</sup> Philip L. Quaglieri, America's Labor Leaders (Lexington, MA.: Lexington Books, 1989), p. 16

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<sup>27</sup> Marshall Ganz and Scott Washburn, "Union Leadership Project," 1985, unpublished paper in the author's possession.

<sup>28</sup> In some unions the staff are also elected members of the local leadership, but in many unions they are appointed. Both situations are represented in these estimates. In SEIU locals, we estimated that one full-time staff member could be supported for every 500 members, but this was in low-dues local unions. In higher-dues unions, the ratio could be more like one per 400. However, this is a complex equation which must realistically include per capita taxes, negotiation expenses, communications, and many other items, and my figures represent a rough estimate at best.

<sup>29</sup> These include the United Food and Commercial Workers in many areas, where the union rep goes to stores and talks directly with workers, and some of the construction trades. But even in these circumstances, job-site reps or worksite leaders are becoming more common.

<sup>30</sup> Sociologist Pam Roby's study suggests that men stewards represent about 100 workers each, and women about 180 workers each. See Pamela Roby and Lynet Uttal, "Trade Union Stewards: Handling Union, Family, and Employment Responsibilities," in Barbara Gutek, Ann Stromberg, and Laurie Larwood, eds. Women and Work: An Annual Review, volume 3 (California: Sage Publications, 1988), pp. 217-219.

<sup>31</sup> John Dunlop describes a similar progression in his 1990 book The Management of Labor Unions: Decision-Making with Historical Constraints (Lexington, MA: Lexington Books, 1990), p.18

<sup>32</sup> Lois Gray, "Women in Union Leadership Roles," Interface, Department of Professional Employees, AFL-CIO, Washington DC: Volume 17, Number 3, Summer 1988, p. 8.

<sup>33</sup> Gray, pp. 7-9.

<sup>34</sup> See Gray, pp. 7-9, as well as Philip L. Quaglieri, America's Labor Leaders (Lexington, MA: Lexington Books, 1989) and Melvyn Dubofsky and Warren Van Tine, editors, Labor Leaders in America (Chicago: University of Illinois Press, 1987).

<sup>35</sup> From personal interviews with Bob Wages, December 6, 1991 and January 24, 1992 and from the biographical information sheet provided by his office.

<sup>36</sup> From author's interviews and Kim Moody, An Injury to All: The Decline of American Unionism (New York: Verso, 1988), p. 237.

<sup>37</sup> Quaglieri, p. 217, and personal discussions with John Sweeney.

<sup>38</sup> See Coalition of Labor Union Women Center for Education and Research, "Absent from the Agenda: A Report on the Role of Women in American Unions," mimeo, 1980; and Naomi Baden, "Developing an Agenda: Expanding the Role of Women in Unions," Labor Studies Journal, Winter 1986, Volume 10, No. 3, pp. 229-249. I am in the process of documenting and preparing my own research from this year; see also Susan Eaton, "How More Women Can Become Leaders of Today's and Tomorrow's Unions," forthcoming in Glenn Adler and Doris Suarez, eds., Voices from the Union Ranks, to be published by SUNY Press in November 1992.

<sup>39</sup> I owe this analysis to Marshall Ganz and his extensive interviews and research on this subject.

<sup>40</sup> Telephone interview with Don Ephclin, April 27, 1992.

<sup>41</sup> Interview with Marshall Ganz, April 26, 1992.

<sup>42</sup> Service Employees International Union, (SEIU), American Federation of State, County and Municipal Employees (AFSCME), American Federation of Teachers (AFT), and American Association of University Professors (AAUP). For a complete list of abbreviations used, see the Appendices.

<sup>43</sup> Dunlop, p. 22.

<sup>44</sup> Robert Zieger, "George Meany: The Organization Man" in Dubofsky and Tine, eds, Labor Leaders in America, p.324.

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<sup>45</sup> Robert Zieger, "George Meany: The Organization Man" in Dubofsky and Tine, eds, Labor Leaders in America, p. 324.

<sup>46</sup> Lewis is quoted in Charles Heckscher, The New Unionism (NYC Basic Books, 1988), p. 28.

<sup>47</sup> Dunlop, p. 19.

<sup>48</sup> See Charles Heckscher in The New Unionism, p. 16.

<sup>49</sup> Bywater, quoted in Quaglieri, p. 47.

<sup>50</sup> Defee, quoted in Quaglieri, p. 85.

<sup>51</sup> See Dunlop, pp. 86-87.

<sup>52</sup> This figure is accurate as of 1990, when it was calculated during our strategic planning process by staff of the Organizing and Field Services Department where I worked as Field Services Coordinator.

<sup>53</sup> In some cases having two "leaders" creates conflict, as might be expected. One of my case studies explores such a conflict which occurred at SEIU Local 285, which after a 10-year struggle with structure and role definitions has reorganized its leadership structure so there is an elected president and an appointed staff director. In the process of restructuring, considerable leadership tension emerged and one strong woman leader ended by leaving the local. In AFSCME, a significant number of female local presidents is balanced by women's relative absence from district council director jobs, where 50-60% of union resources and power rest.

<sup>54</sup> These quotations are excerpted from survey responses and some names and details have been omitted to protect confidentiality or because the respondent did not include them. See section on Methodology, Appendix A.

<sup>55</sup> Interviews with Nancy Mills, December 13, 1991 and January 23, 1992.

<sup>56</sup> Barbara Wertheimer and Anne Nelson, Trade Union Women: A Study of Their Participation in New York City Locals (NY: Praeger, 1985), p. 155.

<sup>57</sup> This finding is verified in Helen Elkiss and Ruth Needleman's unpublished notes on a workshop conducted at the University of Illinois on "Barriers to Union Participation" in December 1988. The other motivating factor was dissatisfaction with current working conditions

<sup>58</sup> Fire quoted in Quaglieri, p. 97.

<sup>59</sup> Roby, p. 224.

<sup>60</sup> Interview with Richard Bensinger, March 1992.

<sup>61</sup> Unfortunately, data on the question of women's representation on union staffs is sadly incomplete. However, in the last ten years there has been remarkable progress, at least in the unions representing the most women. CLUW's 1980 study, Absent from the Agenda, showed that only 16% of union non-clerical staff members were women; Naomi Baden's 1985 update doubles that figure to 32% for a study of 15 large unions representing 4 million women. SEIU in 1985 had 35% women professional staff and now the figure is closer to 50%. For the AFT in 1985 the figure was 34%, for CWA 24% and for the Teamsters 11%. This compares to the NEA's staff which was 58% female in 1985. So some unions are hiring more and more women. My own research data from 1990-92 is summarized in Appendix D's charts.

<sup>62</sup> The steward or worksite leadership level is where the demographics of the leadership is most likely to represent the workforce. Pam Roby's study found that in three rare cases where statistics were kept, the percent of women in membership and in steward roles compared at 2% women stewards and 7% women members in one local, 55% women stewards and 68% members in another, and 86% stewards with 92% women members in a third. These statistics, along with my own and other studies, suggest that there are many female stewards already active in union locals. This suggests that unions need to do very specific work to find out why the numbers of women leaders drop so dramatically in union-wide office and on staff.

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<sup>63</sup> Jim Green and Pat Reeve at the University of Massachusetts and Hal Stack at Wayne State University are among the excellent labor educators who can provide guidance and resources on developing an orientation and other training programs.

<sup>64</sup> See Arlie Hochschild, The Second Shift (NY: Avon, 1989). See also Pamela Roby and Lynet Uttal, "Trade Union Stewards: Handling Union, Family, and Employment Responsibilities," in Barbara Gitel, Ann Stromberg, and Laurie Larwood, eds., Women and Work: An Annual Review, Volume 3 (California: Sage Publications, 1988) pp. 217-219.

<sup>65</sup> Interview with Mary Ann Collins, Organizing and Field Services, SEIU, April 1992.

<sup>66</sup> Wertheimer and Nelson, p. 154.

<sup>67</sup> Deborah Tannen, You Just Don't I Understand (New York: William Morrow, 1990), p. 65.

<sup>68</sup> Interview with Don Ephelin, April 26, 1992.

<sup>69</sup> Interview with Don Ephelin, April 26, 1992.

<sup>70</sup> Interview with HUCTW activist Ellen Carey, March 25, 1992.

<sup>71</sup> Interview with Marshall Ganz, April 20, 1992.

<sup>72</sup> For more detail on the formation and founding of WILD, see Cheryl Gooding and Pat Reeve, "Coalition-Building for Community-Based Labor Education," in Policy Studies Journal, Volume 18, No. 2, Winter 1989-90, pp. 452-460. Or you can contact WILD at 617-536-6949.

<sup>73</sup> Robert Greenleaf, "The Servant as Leader," pamphlet, published by the Center for Applied Studies, 1973, p. 11.

<sup>74</sup> Interview with Bensinger, March, 1992.

<sup>75</sup> Debra Ness and I ran the program for SEIU during 1987 and reported on its results to Andy Stem and John Sweeney at the conclusion of the one-year pilot project.

<sup>76</sup> Eliseo Medina, quoted from SEIU Leadership meeting, October 1991.

<sup>77</sup> Interview with Donnene Williams, January 3, 1992.

<sup>78</sup> Interview with Kris Rondeau, October 1, 1991.

<sup>79</sup> Interview with Rondeau, October 1, 1991.

<sup>80</sup> Howard Gardner, The Unschooled Mind (Basic Books, 1991), pp. 123-124.

<sup>81</sup> Polanyi's 1958 book is quoted in Gardner, p. 122.

<sup>82</sup> See several essays of international union secretary-treasurers in Quaglieri, for commentary on the "second banana" syndrome.

<sup>83</sup> Gray, p. 9.

<sup>84</sup> Clara Day, "Black Women in the Labor Movement: Interviews with Clara Day and Johnnie Jackson," Labor Research Review, volume 11 (Spring 1988), p. 84.

<sup>85</sup> Roby and Uttal, pp. 225-235.

<sup>86</sup> See Wertheimer and Nelson, Roby and Uttal, and Drucker.

<sup>87</sup> Interview with Bob Wages, December 6, 1992.

<sup>88</sup> The early ideological and political development of the union organizing core requires more research with the primary actors. Marie Manna, before her work at Harvard, had been trained in community organizing with Jobs with Justice and United Labor Unions (ULU). Kris Rondeau had no formal organizing training to my knowledge, but had volunteered with women's advocacy groups and others.

<sup>89</sup> Interview with Marie Manna, February 23, 1992.

<sup>90</sup> Interview with Manna, February 23, 1992.

<sup>91</sup> Interview with Manna, February 23, 1992

<sup>92</sup> Interview with Kris Rondeau, October 1, 1991.



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<sup>93</sup> There are various stories about how this affiliation came about; one involves a Harvard Trade Union Program attendee from AFSCME who was impressed with the union's organizing during his time on campus and who told the president of AFSCME he needed to meet these organizers. The affiliation agreement has not been made public, but sources indicate it included a major \$500,000 subsidy.

<sup>94</sup> Interview with Donnene Williams, January 3, 1992.

<sup>95</sup> HUCTW's "Working Together" Program, included in Harvard Business School Case 9-490027, Revised February 16, 1990, by David Palmer, Charles Heckscher and Ray Friedman; see also p. 9.

<sup>96</sup> Harvard Business School Case 9-940-027, pp. 9 and 11. See also Harvard Business School case 9-490-08 1, by Charles Heckscher, revised January 4, 1991.

<sup>97</sup> Interview with Marie Manna, Feb. 23, 1992.

<sup>98</sup> Interview with Harvard activist generously shared by BC sociology graduate student Sharon Kurtz.

<sup>99</sup> Interview conducted by Sharon Kurtz, 1991.

<sup>100</sup> Interview with Marshall Ganz, April 26, 1992.

<sup>101</sup> Interview with Donnene Williams, January 3, 1992.

<sup>102</sup> Interview conducted by Sharon Kurtz, 1991

<sup>103</sup> Interview with Donnene Williams, January 3, 1992.

<sup>104</sup> Interview with Donnene Williams, January 3, 1992.

<sup>105</sup> A part of the labor movement has always been exclusionary; but it is shrinking.

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## APPENDIX A

### Methodology

#### Surveys

My survey research sampled three groups of union leaders: 14 Boston area women union leaders who are active in the Boston Coalition of Labor Union Women and/or The Women's Institute for Leadership Development; 57 national Coalition of Labor Union Women delegates to the national convention in Pittsburgh, Pennsylvania in October 1991; and 9 trade unionists from the Harvard Trade Union Program, 1992 session. The 80 leaders thus surveyed were from 26 different unions in the US and Canada, and three foreign federations. They included 28 staff members, 49 officers or rank and file leaders, and 4 foreign delegates (status uncertain). The survey is not intended to be statistically unbiased or representative, but rather to elicit a broad range of experience and ideas about union leadership, formative experiences, and felt needs for leadership training and development.

Because of the two national groups surveyed, the respondents came from 24 states in the US and 4 other countries (Canada, Sweden, New Zealand, and Australia). The respondents were asked to identify their "racial, national or ethnic identity." Of those who responded (8, or 10% declined to state), 78% were white (including 2 who identified themselves as Jewish), and 22% were minority. They included 11 African-Americans, 2 Hispanics including 1 Puerto-Rican, 1 Maori, and 2 West Indians. Their length of service as union activist was quite long, possibly reflecting their role as national convention delegates for CLUW or trade union program attendees.

A copy of the survey is attached as Appendix B, and a list of the titles of the respondents and their unions and years of service is attached as Appendix C.

## INTERVIEWS

In addition to surveys, I have conducted interviews with more than 30 union leaders and 30 union staff, both men and women from a diversity of racial and cultural backgrounds and ranging in age from their 20s to their 70s. Their work has ranged from healthcare to carpentry, from teachers to ironworkers. Some are professional organizers, who devote their lives to leadership development. These taped interviews have ranged from one to eight hours in one to four sessions, with most averaging about two hours. Some have been combined with the case study research of the Harvard Clerical and Technical Workers Union, the SEIU local 285, WILD, and Boston CLUW. The interviews have ranged widely depending on the person, although I have used an interview guide.

I have also organized or participated in two focus group sessions of Boston area union women leaders, in September 1991 and March 1992, which were targeted on leadership development themes. Finally, I have interviewed a number of scholars about their work in this area and benefited greatly from conversations with many of those whose work is listed in the bibliography.



## Appendix B

### Union Leadership Survey

Attached is a copy of the union leadership survey distributed at the October 1991 Coalition of Labor Union Women Convention, at a January session of the Harvard Trade Union Program, and to a small focus group of twenty Boston area women union leaders from a variety of industries. The response is discussed in Appendix A, Methodology, and the list of most respondents' unions and positions is attached as Appendix C.

## Union Leadership Research Project

SEIU member Susan Eaton is conducting research at Radcliffe College this year on union leadership. Please fill out this survey and indicate if you would be willing to be interviewed further. Thanks for your support!

Name \_\_\_\_\_

Mail Address \_\_\_\_\_  
\_\_\_\_\_

Phone (s) \_\_\_\_\_

Union/Organization(s) \_\_\_\_\_

Local \_\_\_\_\_

Role in Union/Org. \_\_\_\_\_

Years active in labor \_\_\_\_\_

Race, ethnic, or national identity \_\_\_\_\_

Gender \_\_\_\_\_ woman \_\_\_\_\_ man

Would you be willing to participate in a future discussion/interview or survey on the topic of leadership?

\_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Comments \_\_\_\_\_

How would you define "leadership?"

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Please describe one important event or person from your past personal experience which motivated you to want to be more involved as a union activist or leader.

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---

Please describe one thing you are doing now to develop new leaders.

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What are the biggest problems or challenges you have faced as a leader ?

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What skills or support do you find you need the most to continue your growth?

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PLEASE RETURN THE SURVEYS TO: SUSAN EATON

c/o The Bunting Institute

34 Concord Avenue, Cambridge, MA, 02138

## APPENDIX C

### List of those Surveyed

UNION	ROLE	STATE	YEARS ACTIVE	RACE/ETHNICITY
ACTWU	Joint Board Delegate	KY	15	White
ACTWU	International Rep	Ore	21	Afro-Ame
ACTWU	Local President and Chair of Joint Board	Indiana	49	Black
ACTWU	Former general Officer	New	58	Polish
AFSCME	International Union Organizer II	WV	7	
AFT	President of WFT	WI	15	White
AFT	President	CA	23	Caucasia
AFT	National VP, Local 59 President, MFT	MN.	25	White
AFT	Secretary, Retired Division	CA	30	White
American Postal Health Paln Rep		NY	12	Human
ATU	Ass. Board Member	Illinois	6	
Carpenters		MA		
Commonwealth Bank	Senior Organiser and Training Officer	Australia	22	Australian
CWA Unit	Vice President, Chair Women's 15201		10	White,
CWA	Local President	CA	12	Italian-Am
CWA	Vice President	CO	12	White
CWA	Staff Representative, International	PA	23	White
CWA	President (30), Barg. Cmte (15)	MO	40	white
CWA CWA	Staff Rep for Kentucky; former pres,	KY	41	White
CWA- CLEAT	President	Texas	22 -	White
Fire Fighters	Past President	Texas	22-	White
IBEW	Steward	CA	15as	White

ILGWU Political Director NT 30+ Black

IUE International Rep Tennes 11 Black

IUE International Representative Arkansas 31 Black

Local 1199 Cultural Affairs Director New 6 African-

Local 1199 Executive council rank and file member NY 9 Afro-Ame

Local 1199, Hospital Organizer NY 5 Dominica

Local 1199—NYC Delegate NY 23 Black—

MAPE- Mn. Assoc. of Chief Steward of local – negotiations MN 19 American

NEA UniServ Director (BA and Organizer) Kansas 21

OPEIU MI 26 Italian

Operating Engineers Business Rep CA 13 Caucasia

Painters and Allied Financial Secretary CA 15 Caucasia

Public Service Union Educator Coordinator New 30 Maori

SEIU Secretary- Treasurer Washin 18 Caucasia

Sheet Metal Workers International Organizers New 26.5 Italian-Am

Steelworkers President and volunteer organizer PA 19 White/

Steelworkers Staff representative Quebec 20 (*French-*

Steelworkers Staff Rep LA 25 Caucasia

Steelworkers Grievance Stewart PA 30 Irish

Steelworkers International Organizer, past local IN 6 White

Swed. Metalworkers National Negotiator Sweden 20 Swedish

Teamsters Member, housing Assistance Chapter (>?) NY 5(?) Hispanic—

The Newspaper Guild Local President PA 11 Italian,

The Newspaper Guild Local administrative officer CA 12 American

The Newspaper Guild Executive Secretary of Contracts MD 13 White

The Newspaper Guild Administrative Officer Washin 15 African-A

The Newspaper Guild International Representative OH 23 Caucasia

The Newspaper Guild Human Rights Director MD 19 Hispanic

UAW Education Chair, Trustee, Women's MI

UAW Women's Committee, Community Service Ohio African

UAW Chair, Women's Committee, Michiga 11 Afro-Ame

UAW Education Committee, Women's Texas 12 White

UAW Editor and CAP Delegate MI 13 White

UAW Chairman Consumer Affairs and Union OH 18 Afro-Ame

UAW Vice President; Chair, Public Sector; MI MI 30 Caucasia

UAW Recording secretary- Women's Council New 7 (

UFCW International Rep. Region 13 Iowa 12 American

UFCW Director of Safety and Health and Vol. Org. New 12 Italian

UFCW Vice President/Union Rep CA 20 Caucasia

UFCW Representative PA. 24 White

United Electrical General Secretary-Treasurer PA 19 Irish-

United Mine Workers Political Action/ Organizing PA 8 White

United Univ. Prof. Chapter President; Member NY 12 Jewish

United Univ. Prof. Chair, Legislative Committee NY 16 none

## Appendix D

### Charts and Research Results – Union Leadership

Attached are six charts reflecting updated research by Pradeep Kumar and Linda Briskin in Canada, and by Wynn Huang and Susan Eaton in the US. They represent best estimates in some cases, with hard data being difficult to verify and sometimes unavailable. Much more work remains to be done before a true picture of there figures emerges.

D-1: US : Percent Industry Organized, Women in Industry, and Women in Unions

D-2: Women and Minorities in Industry and Percent Organized, US, 1990

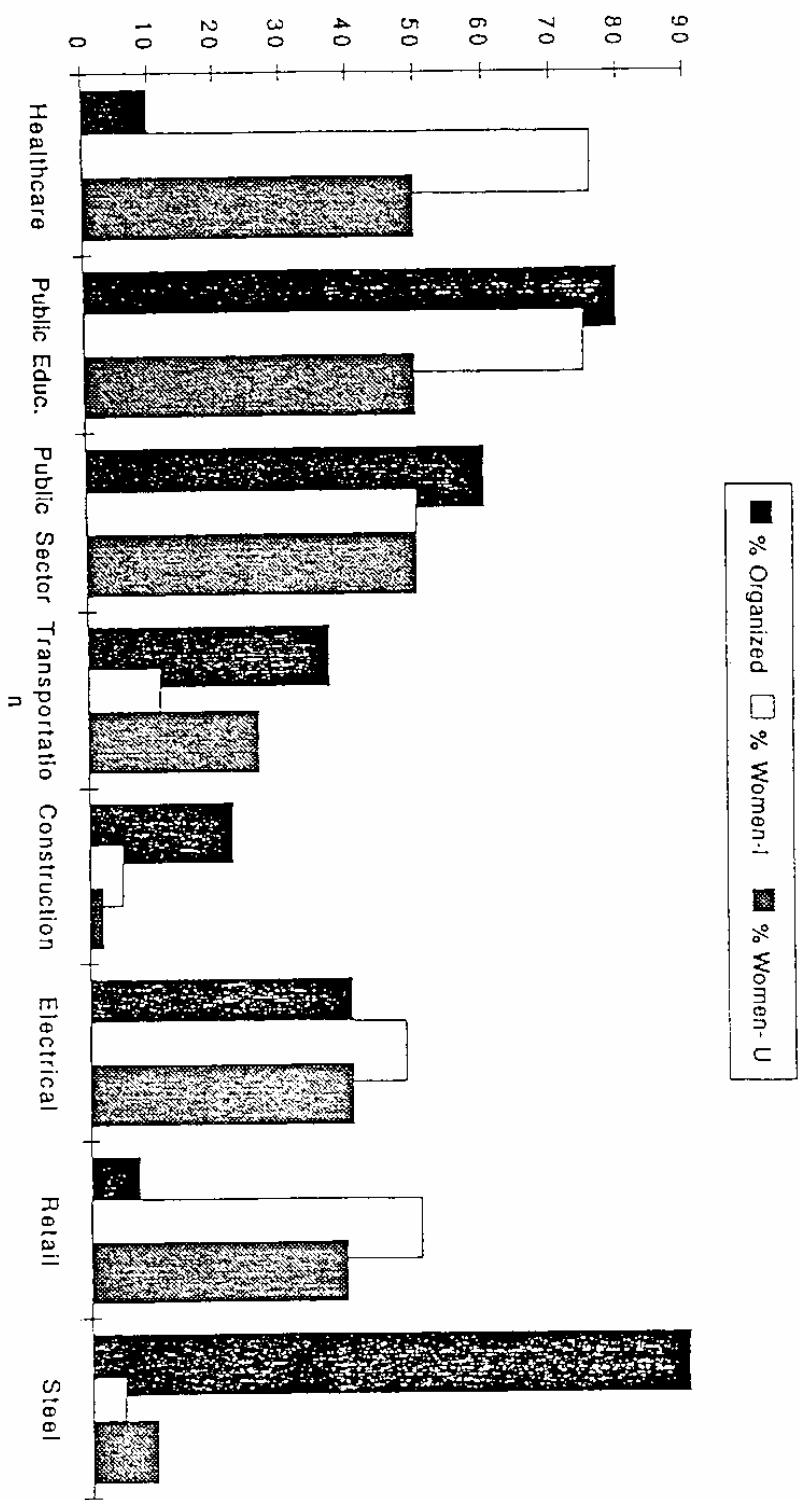
D-3: US Unions: Percent Women Members, National Leaders, and Professional Staff, 1991 (tentative)

D-4: Canada: Union Organization by Sector and Sex, 1980

D-5: Number of Women in Key Canadian Unions, 1991

D-6: Canadian Women Union Leaders, 1980.

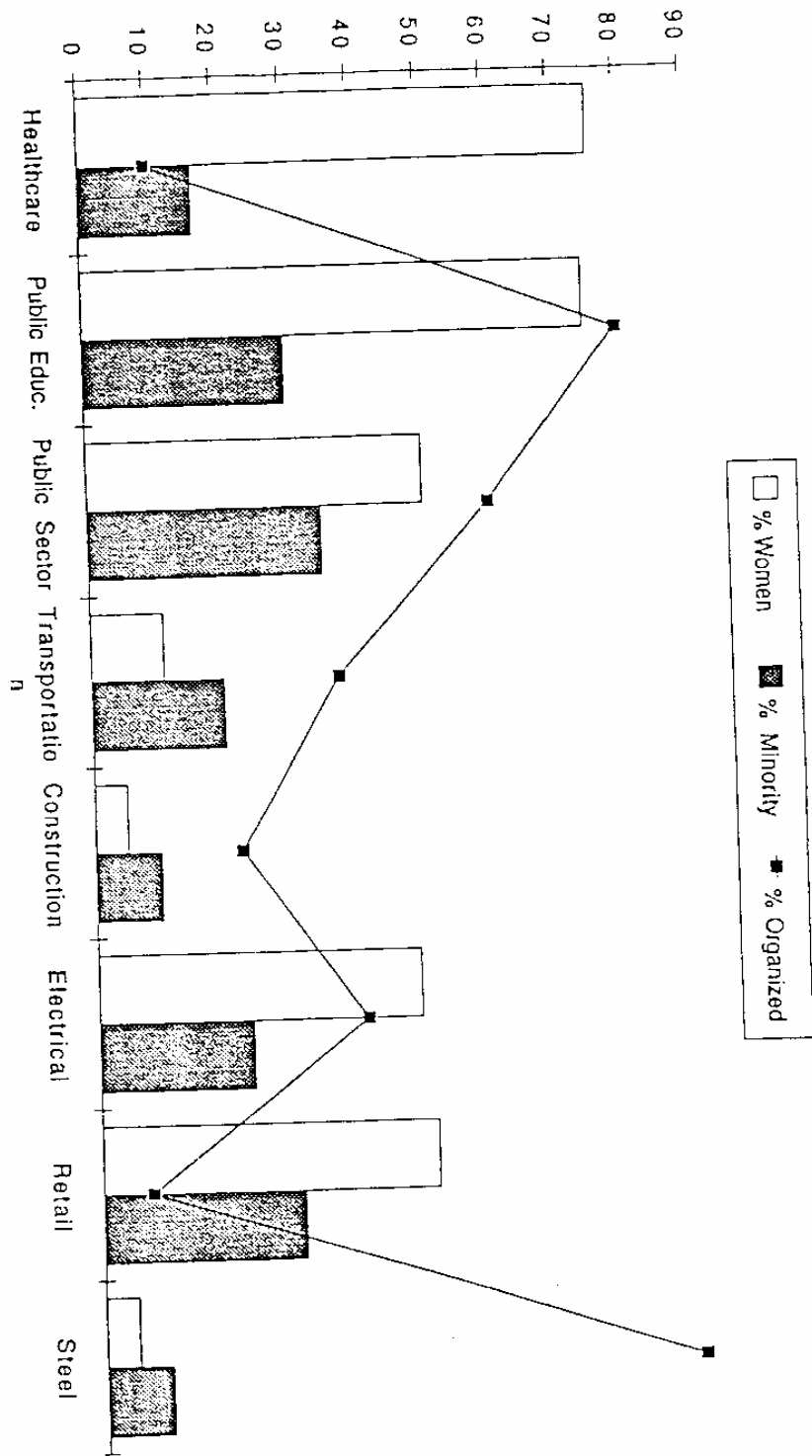
U.S. Percent Industry Organized, Women in Industry, and Women in Union



Data compiled from interviews and published accounts, 1991 (Eaton)

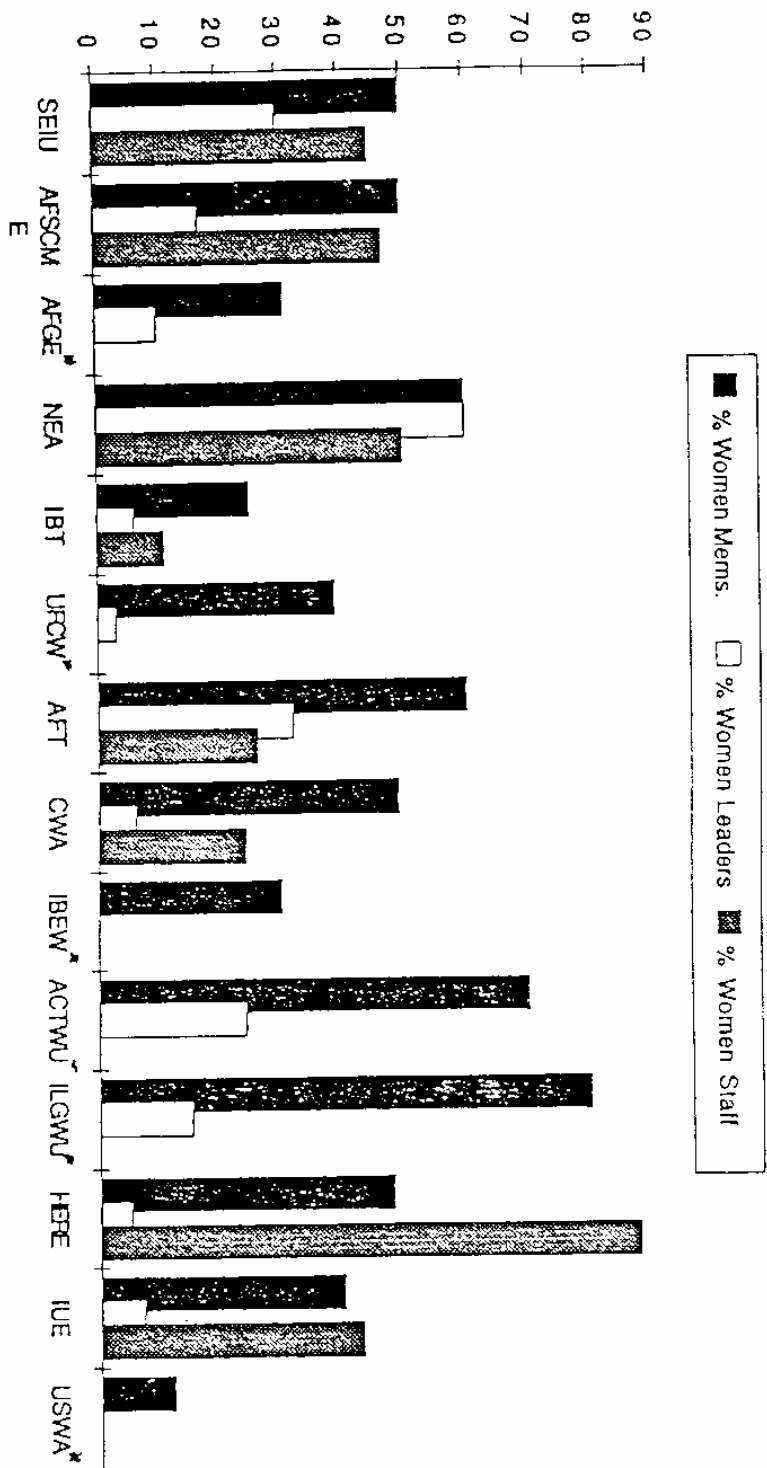


# Women and Minorities in Industry and % Organized, US, 1990



Data from US Department of Labor, 1990

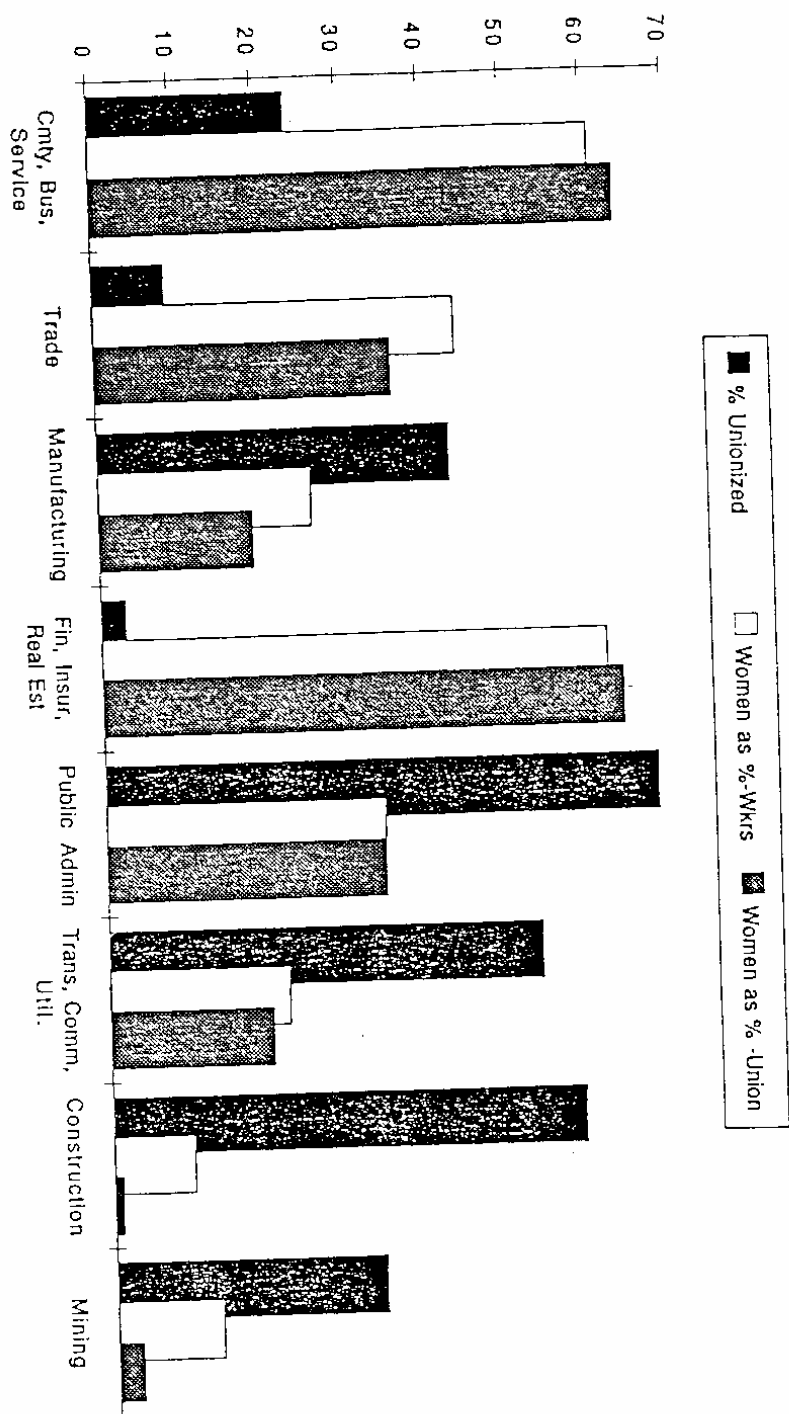
# US Unions- % Women Members, National Leaders, and Professional Staff



Data collected by W. Huang and S. Eaton, 1991- Not for reproduction

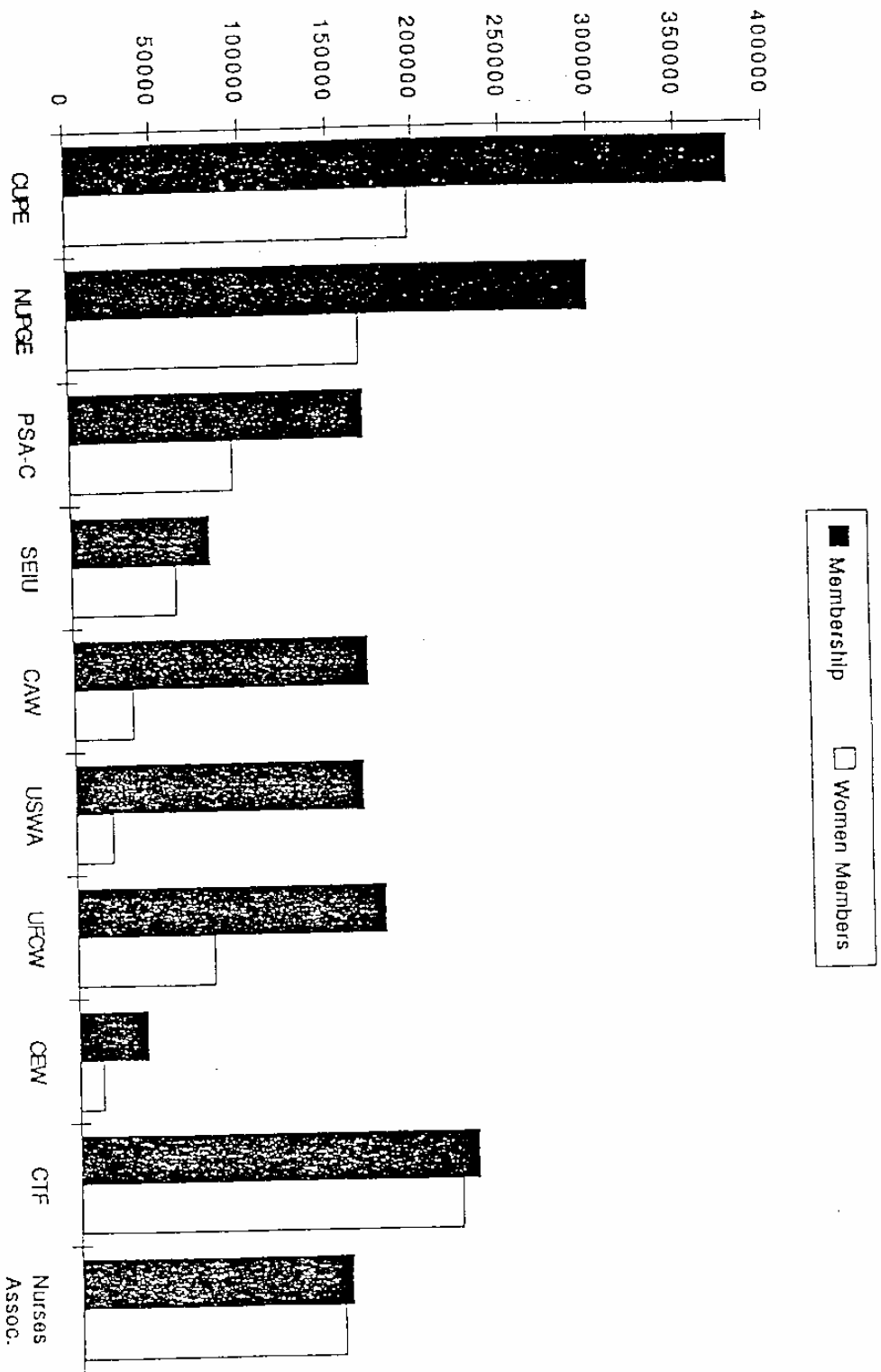
\* No information available on union staff for these.

# Canada- Union Organization by Sector and Sex, 1980



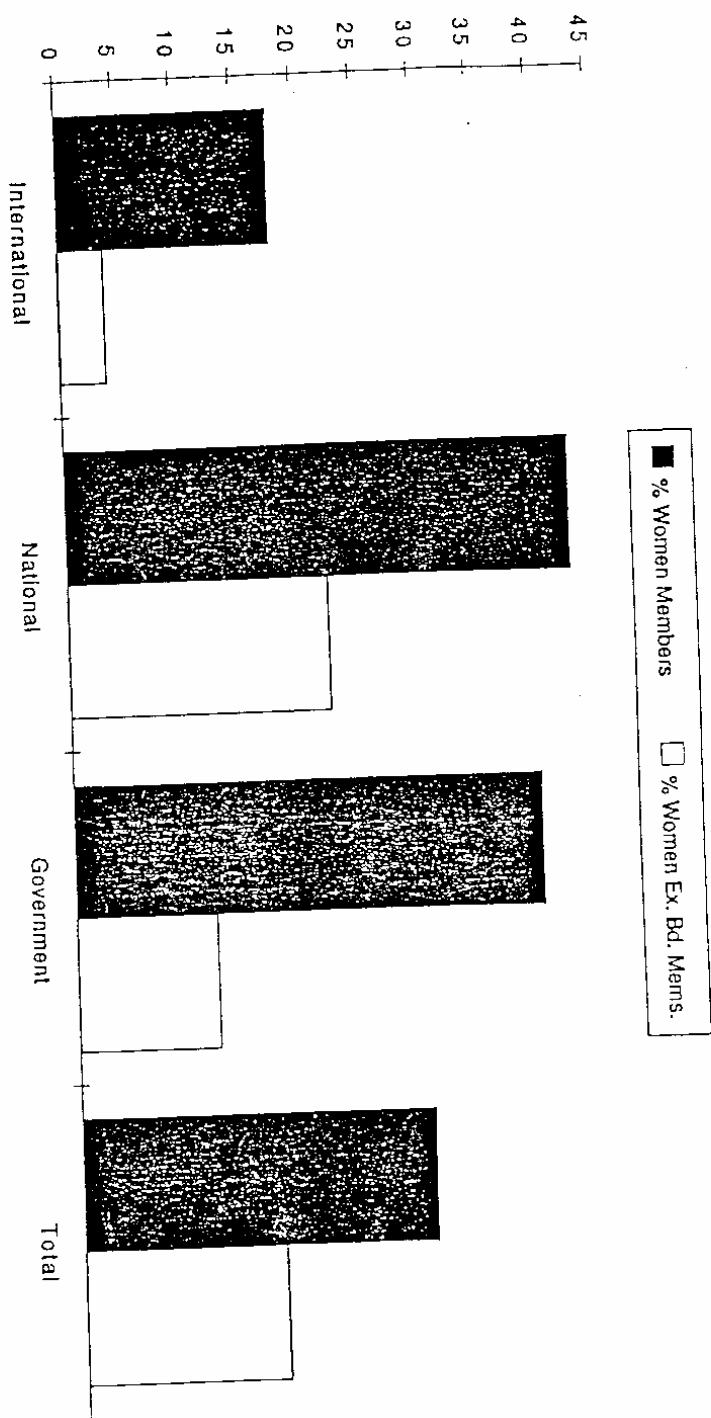
Data from Linda Briskin, Women and Unions in Canada, p. 31

No. of Women in Key Canadian Unions, 1991



Data from P. Kumar, unpublished paper, 1990

# Canadian Women Union Leaders, 1960



Data from L. Briskin, Women and Unions in Canada, p. 37

No. of Women in Key Canadian Unions, 1991

## Appendix E

This appendix consists of a report and series of recommendations contained in my 1990 report focusing on women's leadership development. It is presented as it was written to give an example of the concrete steps a union can take at the national or local levels. Jay Foreman, a national officer of UFCW, was quoted in a 1990 national labor report as saying that his union had done a great deal to promote women leaders. But he said, "At the local level there's not a whole lot more you can do besides exhort. But we've been exhorting for some time now!"<sup>1</sup> This set of recommendations is presented to demonstrate what can be done-- both at the local and national level. Here is my 1990 report:

### **SUMMARY: STRUCTURAL, PROGRAMMATIC, AND CULTURAL BARRIERS TO WOMEN'S LEADERSHIP DEVELOPMENT IN UNIONS and WAYS TO BREAK THEM DOWN**

In this final section of my paper I will summarize a variety of changes which women need to agitate for and labor leaders need to initiate in order to fully support women's development as leaders.

Unions as institutions cannot be the sole determinants of whether women succeed as leaders. Certainly our corporate culture has not provided us with excellent examples of developing leadership among women and people of color, although there are some valuable lessons to be learned from management.<sup>2</sup>

Society presents formidable obstacles to women leaders, and women ourselves must take responsibility for ways in which we do not always seek or carry out leadership roles even when there are opportunities. To fully realize each person's potential there must be vast social change (less discrimination, less poverty, less job segregation, more education, more child care and child development programs, more equality between men and women within families, to name a few) as well as personal change.

Women must often assume an extra burden of dealing with our own internalized oppression, as some describe it, which causes us to believe what a discriminatory society or person may say about us - we are not good leaders, we don't have what it takes, we aren't as smart or as capable or as persevering or as politically astute, etc. And we may have to spend extra time dealing on family issues as well as dealing with the emotional impact of leading in an unsupportive environment. Finally we must not forget the political organizing and struggles which are necessary for change within and without our unions.

So I don't intend to minimize the social change, political organizing, or personal change which may be needed to help realize women's leadership potential. Rather I am focusing on the institutions of unions because I believe that union leaders at all levels can, and should take responsibility for the change they can achieve -- and that will have a dramatic impact on the future of their union.

In looking at what union leaders who want to promote women's leadership can do concretely, I found it useful to look at three areas: structure, program, and content. I have used the national or International union as my model in thinking of reaching the most women, but most of these suggestions should also be carried out at the local union level.

## **STRUCTURAL CHANGES**

I think as a woman, and as a black woman, you just have to prepare yourself to work harder at the job, to give more of yourself to the job in order to receive a two-thirds recognition that a man, a black or white man, would receive.<sup>3</sup>

We must not have to rush home all the time because stopping and having a conference, a caucus, is where you really broaden your knowledge. But if you don't have child care at home, you must go home.<sup>4</sup>

-- Clara Day, Teamsters

Probably the most significant structural change unions must make is in the amount and type of resources they devote to developing women leaders. In particular, this mean assigning responsibility

and resources to a women's program which is broad enough to affect the whole union.

This could take the form of a separate department, as it has at about 15 unions. Women's departments have certain advantages-- an ability to focus on the issue, a readymade networking function, and lead responsibility for managing the union's programs. The risk they run is the same as separate Civil Rights departments-- being marginalized, underfunded, and not being able to really influence the mainstream activities of the union through a lack of resources and power. Unless a department has the ability and right to effectively influence programs of other "line" departments of the union, its staff will have to rely on personal relationships and it will mainly be able to "exhort" rather than make real change.

Union leaders should create an interdepartmental work group with representation of women elected leaders and one high-level staff head. This group can review how women's leadership development and women's concerns are reflected in all the union's programs -- bargaining, communications, legislation, organizing, etc. The test of a program's seriousness is the actual resources assigned to it, and the actual results being produced from it.

At SEIU, women on the Executive Board formed an informal group which President Sweeney soon designated as the Women's Program Advisory Committee. This group reports to the full Board at regular meetings on the progress of SEIU local and International programs, and makes recommendations to the officers and staff of the union. Accountability to some leadership body is important to avoid the two extremes of staff dominance of the program or staff isolation.

The second most important structural change a union can make is to expand the opportunities for women to earn leadership. In some cases, this will simply mean filling vacant positions, from the steward to committee to executive board level. In others, it will mean expanding leadership roles. A new organizing committee could be created with a special charge to organize in the service sector, and a woman appointed as chair. In large organizations, subdivisions could be headed up by women. In small organizations, confederations could be led by women.



Fortunately, there is plenty of work to be done and plenty of women who can undertake it under the right conditions. This will require unions to change their constitutional procedures in some cases, and to exercise affirmative action in others. The Democratic Party has managed to ensure 50% women delegates to its conventions; unions can certainly improve on its record.

Third, unions can support organizations specifically devoted to developing women's leadership. Structurally within SEIU, this meant an agreement between SEFU and 9 to 5, The National Association of Working Women, to create a special national local, District 925. The District has been and remains under control of women leaders, and it maintains a close relationship with 9 to 5. Its programs, organizing style, and representation are independent of SEIU, although it could always use more resources.

Other independent but affiliated organizations include the Regina V. Polk Scholarship Fund for Labor Leadership, which was set up by the Teamsters Union following the death of business representative Polk in a plane crash. This fund has sponsored many training programs for women leaders and has sponsored many individual women as well.

Other organizations which unions should support in a systematic way include the UCLEA-AFL-CIO Summers Schools for Union Women and the Coalition of Labor Union Women. Even arranging joint scholarships for one or two women in each local each year to the summer school and recommending that each local sponsor 20 members of CLUW each year would vastly strengthen these important programs. CLUW is now 50% minority in its membership and leadership. There are many other local organizations, like the Asian Immigrant Women Advocacy group in San Francisco, and also LCLAA, CBTU, and APRIs women's caucuses and programs. And it would cost so little.

At the same time, union women must make sure they are getting what they need from these organizations. They all could be improved by more active participation by their constituents.

The fourth structural change a union can make is revising its human resources policies to

more closely fit the needs of women. Beginning with affirmative action programs with clear goals and timetables and continuing through a variety of job-sharing, flextime, part-time, and other positive employment practices, unions must be able to set an example for employers on policy issues. Union jobs in particular, which often require 60 to 80 hour work weeks and extensive travel, need to be reviewed to see how they can more realistically fit the needs of working women. Provision for child care at conferences is now mandated by AFSCME, and there is a childcare fund at SEIU to help pay for child care expenses on extra-long assignments.

To help women move into staff leadership positions where there is no turnover or limited opportunity at the local level, a national union should create a "job bank" of job openings at locals around the country. Perhaps unions should share this information. Hiring is still a political act, but many local union leaders have a hard time finding a range of capable staff when they do need to fill positions. It is particularly important to ensure women become managers, with real responsibility for hiring, firing, budgeting, and program development

Fifth, the union can revise its expectations of locals to make recruiting women leaders a part of the normal routine-- like raising political action funds, handling member complaints, and putting out communications. If locals and staff were evaluated on their success in recruiting women, more women leaders would be identified.

Sixth, the union can create apprenticeship and intern opportunities and build them into the budget. These are excellent ways to develop leaders.

## **PROGRAM**

A union's program encompasses its basic "business." Following is a series of recommendations of what women should organize for and unions should establish.

The major programmatic change that unions should make, and women should fight for, is a

dramatic expansion of training programs and opportunities for all levels -- from stewards to top elected leaders, including staff and managers. They must be accompanied with real power-sharing and affirmative action so that women who are hired or elected can succeed at their jobs and do not have token leadership roles or make bad leaders. There is much more that could be said, but current training programs are simply inadequate to our leaders' needs. These programs also need to include follow-up and ongoing support on the job for stewards and staff. We shouldn't confuse lack of opportunity with lack of training, but training is essential for women to seek and hold higher positions.

Second, the union needs to know who its current and future members and leaders are. Few unions have collected internal data, much less released it. While this is more easily said than done, unions should be able to make a fairly accurate estimate of their membership and leadership composition today and should try to estimate what their membership will look like in the year 2000. Then they should set goals for leadership at all levels (including management and staff) to reflect the workforce,

Third and just as important, most unions should have an organizing program that focuses on unorganized women. It is clear that women vote for unions more than men, and that Black women vote for unions more than white women. This program must include sufficient resources to win, and a female organizing staff including organizing leaders and managers.

Fourth, union leaders and staff also need to talk directly with their women stewards, staff, and elected leaders -- what is the union environment like for them? What is working about the union's current program? What could be improved? What are particular issues for women of color? This is best done at the local level, although the national should coordinate.

Fifth, unions need to establish mentoring programs at a formal level. The informal mentoring which occurs now is sporadic and undependable, and people are most likely to

hire and support those who look like them. Both men and women can be good mentors, but in different ways. Probably every successful woman has both. Men are almost always in the best position to improve women's opportunities in the union; women act as irreplaceable role models and advisors on dealing with the realities of dealing with a male-dominated culture.

Sixth, it almost goes without saying that women must organize to promote issues of concern to them on the union's bargaining and political agendas-- pay equity, family leave, reproductive rights, non-discrimination, child care, and many others. Only a few unions have taken the lead on these issues despite a 7-million member constituency already paying dues and millions more concerned women unorganized! The current struggle within the labor movement about abortion rights finds CLUW's leadership in an unusually public advocacy position for its members to organize within each union to win support for choice. The AFL-CIO has declared neutrality. ,

Seventh, women should expand our efforts to win support for local, regional, and national conferences for women unionists. These are remarkable opportunities to network and to learn political and union skills as well as providing support and acknowledgement of the many extra hurdles they have to cross to win leadership. Many ideas are exchanged there and long-term relationships are developed which will be critical to encouraging union leaders to support many of the changes needed. In SEIU, the California conference came into being because women leaders fought for support and resources for it; also, a tremendous amount of volunteer time and effort goes into planning and managing it each year. The statewide conference then became regional and served as the basis for the national conferences.

Eighth, unions need to establish intern programs with lost-timers and with college Students which focus on bringing in younger people. With most stewards and activists now over 45, according to both Wertheimer's and Roby's study, unions need to attract young people as well.

Ninth, I believe women within unions should develop and share an orientation program for new

leaders and staff which is supportive to those just joining the union.

Tenth, unions need to expand their programs to support the family and to deal with family issues. This includes modifying meeting times, places and content; helping with transportation, meals and child care; holding more family-oriented events; and redefining steward roles so they are more manageable.

Finally, unions can support other women's organizations and ensure that they build links between union struggles and civil rights, women's political activities, and others. Interaction between union women and women's rights advocates is too limited currently.

In summing up, there are many, many programmatic changes unions can make. Even if women don't control a whole program, they can often gain responsibility for one part and apply these principles to it if they can organize enough internal and external support.

## CULTURE

The "culture" of a union is probably the single most powerful determinant of how people act within the organization. A union's culture is the pattern of behavior, signs, and symbols which articulates its values, what's important to its leaders and what counts as success.

Culture is evident in all the tangible and intangible elements which determine how the union "feels." It is reflected in the physical location, layout, and appearance of the office; in the language that is used daily and in public statements; in the pictures that hang on the wall and the stories that are told to new hires, new members, or anyone who will listen. A union's culture can be open or closed, flexible or rigid, informal or formal, participatory or hierarchical, multi-ethnic or homogeneous, supportive or "macho," or any of many dimensions in between.

This cultural environment is based in the history of the union and its leaders, who have the

most power to consciously shape it. It is also a result and reflection of the membership and the workplaces they come from and work they do. The teachers' unions, for example, place a great deal of emphasis on training and planning -- skills they use in their jobs. Within SEIU, the public sector local unions are most likely to have budgets, computers, and formal administrative practices in place.

Cultures can and do change over time, but they rarely change quickly or abruptly. What is amazing in reflecting on the last ten years is how much trade union culture has changed, and yet how traditional it still remains, and how much more change is needed before many women will feel comfortable within it. The problematic factor is that top leaders are the ones who can most effectively shape or change the culture, and they are usually the ones who either created it or succeeded within it, so they have a powerful incentive not to change it.

I will briefly describe current union culture and discuss some ways it must change in order to provide an open and welcoming environment for women leaders. And it is worth remembering that unions will continue to decline if they do not organize women members, and they can only organize women successfully into an environment where they have some level of comfort and trust. Women union leaders are key to union's futures, however uncomfortable that makes current leaders feel.

In most unions-- some more than others-- the culture can be fairly described as traditional and based in working-class values and experience. In some cases there is a particular ethnic flavor to a union's culture-- more likely Catholic than not, more likely based in the immigrant experience than not, more often white than not. The union leaders most often have been (and are still) white men, and the culture is largely "male." Union culture also contains traditional values about the role of women and the qualities associated with us.

Often a particular culture can inadvertently serve to exclude people even when the leaders don't intend to exclude others. They may not even be aware of the effect of certain habits, practices, or values on others. Union culture can be very intimidating to outsiders or newcomers-- as women are

most likely to be. One small example is the practice of signing letters, "Fraternally yours," which only in the last 5 years has largely given way to "In unity" which is more inclusive.

The traditionally male-dominated union culture has been changing -- very rapidly in some cases-- especially where more women come to work for and participate in the union. But many traditions die hard. If the culture of a conference, for example, involves the male union leaders playing golf, then women union leaders miss out on all the business and fun which occur out there. Just as all-male country or social clubs have been held to be discriminatory, unions need to review their practices to make sure they don't have the same effect. Sometimes women out of necessity or desire for support, create our own sub-culture within an organization. This usually will create a feeling of discomfort with the dominant culture folk, similar to the exclusion the "sub-culturists" feel. However, there is a difference-- the dominant culture is still the domain of those who are more likely to have power and resources, while the subculture can quickly become a place where people feel resentful at their exclusion from both. One of the challenges ahead is to master "cross-cultural communication" and to make all union cultures live up to our values of appreciating diverse experience rather than exclusively valuing one shared experience.

Culture and politics, which is closely related, can prevent or support the selection, hiring, election, training and development of women and people of color. If the leaders at the top do not support this development, it will happen only as the result of "guerrilla warfare," and has tremendously destructive potential.

Unions must be held accountable to create a culture which is conscious of women's worth and value, and where traditional sexist practices are discouraged or eliminated. This kind of culture already exists where the majority of workers and leaders are women; it can exist where the male majority has adopted these values. Women will have to fight the hardest battles to change the culture of our unions. But it is worth it in the end. While history plays a key role, the leaders of today are in the most powerful position to make conscious changes in the culture of their unions.

This can be done in many ways:

- by honoring new heros
- by valuing women and minorities
- by promoting women
- by spending time with the excluded
- by setting a personal example
- by making policies which reflect the rhetoric
- by setting up the programs which support the policies
- by allocating resources
- by recognizing cultural differences and talking  
about and learning from them
- by expanding leadership
- by valuing many leadership styles
- by the proper orientation of new staff and officers
- by positive reinforcement
- by implementing affirmative action

Changing culture is a complex and difficult thing. The union's culture belongs to all of us, and the leaders must do their best to make a very diverse membership and leadership feel at home.

The changes I have discussed above must be considered as part of each stage of leadership development-- hiring/recruitment, orientation, training, development and promotion, and assuming leadership roles. Future work is needed to review more systematically what each union is doing, how current changes have been achieved, and what specifically a program and budget would look like which would accomplish all these recommendations in practice. No doubt women have to



organize and fight for these changes just as men leaders will have to make changes they don't feel comfortable with. But if the unions we and our forebears have struggled so hard to build are to reverse their decline and grow by organizing the new workforce of women, people of color, and new immigrants, our structures, programs, and cultures will have to change so they will be more welcoming and supportive of new and excluded groups.

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<sup>1</sup> "More Women Gaining Positions in Union Leadership Structures," Daily Labor Report, (Washington, DC: Bureau of National Affairs, 24 September 1990).

<sup>2</sup> See Rosabeth Moss Kanter's work as well as Peter Drucker's management texts on the values of a "feminine" style of leadership.

<sup>3</sup> Clara Day, Labor Research Review, Summer 1988, p. 84.

<sup>4</sup> Ibid.