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## Union Organising and Full Time Officers: Acquiescence and Resistance

### Abstract

*In the mid 1990's the TUC relaunched itself with a strategy for renewal labelled 'new unionism'. The strategy had two strands, partnership with employers and the promotion among affiliate unions of grassroots union organising. The latter, heavily influenced by US and Australian experience, saw possibilities for a more radical trade unionism in the UK. This paper draws on a case study of Unison to analyse the organising strand of new unionism. It identifies how top down approaches to organising are distorted by union bureaucracy for their own priority of recruitment, not only limiting the possibility of emerging union radicalisation but restricting the ability of trade unions to represent their members. It also identifies that the position of union FTO's is complex and not necessarily within a uniform union bureaucracy juxtaposed to and restraining a more radical union rank and file.*

### Acronyms

AO – Area Organiser

FTO - Full Time Officer

LO – Local Organiser

RO – Regional Organiser

SEIU – Service Employees international Union

TUC – Trades Union Congress

WOW – Winning the Organised Workplace

### Introduction

The ongoing decline in UK trade union membership, from a peak of 13,289,000 in 1979 (TU Certification Officer, quoted in McIlroy 1995) to 6.2 million by 2017 (DBEIS 2018), has seen several unsuccessful renewal strategies in response. These have included union mergers, the promotion of individual consumer unionism and single union deals (McIlroy 2010). In the mid 1990's the TUC relaunched itself under the heading 'New Unionism' creating much academic interest over a proposed renewal strategy with two strands, the promotion of employer partnerships and back to basic grassroots workplace organising. The organising element of new unionism was influenced by the apparent success in the United States of the SEIU (Voss and Milkman 2000, Bronfenbrenner et al. 1998, Bronfenbrenner and Juravich 1998, Milkman and Voss 2004). By adopting the 'organising model', in contrast with a 'servicing model' (Russo and Banks 1996), unions needed to emphasise the traditional workplace union building role of their roots as an alternative to servicing a declining membership. The promise of a more radical form of trade unionism and the opportunity for different union constituencies to find congruence behind a priority of union building was evident (Carter 2000). However, whilst there was some comparability in the reasons for

union decline, not least a cold political climate, the UK context presented unions with their own specific and significant challenges (Carter and Fairbrother 1998a).

A series of major industrial defeats of individual and powerful unions had weakened trade unions. A changing industrial terrain had emerged with the introduction of a raft of worker's individual legal rights over and above the protections arising from traditional actions of collective solidarity (Howell 2005). This emphasis on individual rights was reinforced through the encouragement of procedural resolution of workplace grievances in TUC and union training courses (Holroyd 1994). Consequently, the rise in demand for trade union representational work at an individual level, in addition to collective bargaining and consultation arrangements, presented major practical and logistical problems given dwindling resources (Carter 2000). The evidence here identifies that, in the case of Unison, such challenges were ignored, with organising work becoming synonymous with recruitment and prioritised by the Unison secretariat over member representation. Such an approach ignored the possibilities and opportunities for building union organisation around members workplace issues.

The paper identifies that competing priorities of recruitment and member representation presented dilemmas for FTOs in Unison: their response was not uniform or consistent. In the US where tensions over the role of FTOs and lay activists have exacerbated with increased central union direction (Early 2009, McAlevev 2012), or member led campaigning (Rooks 2002), resistance from FTOs to the shift from servicing to organising occurs (Fletcher and Hurd 1998). In the UK similar resistance was found (Daniels 2010): although Daniel's reference to Carter (2000) in the case of MSF failed to acknowledge FTO opposition was not to organising work itself, but to the manner in which it was introduced, defined and applied. This framing of FTO responses to organising fails to recognise that resistance can also stem from the negative consequences on union organisation of imposing bureaucratic priorities over those of the grassroots membership. Whilst Unison has been described as an organising union (see Waddington and Kerr 2009), these findings resonate with those of Carter and Kline (2016) and Saundry and Webster (2013). The former identify the corrosive effect of a lack of workplace focus and subsequent alienation of the membership from engagement and action, while the latter identify the superficial nature of claims of organising success.

The considerable research into union organising has largely neglected the pivotal role of FTOs and the influence of union bureaucracy. By considering organising within a framework of classical sociological perspectives (S. and B. Webb 1894, Michels 1962), this paper reflects on how union bureaucracies can distort strategy and dominate union priorities. However, the evidence questions analyses of FTOs characterised as a uniform group, unambiguously part of the 'bureaucracy'. Focusing primarily on a region of Unison, the UK'S largest union, the paper considers the contrasting perspectives within union constituencies on both the role of FTOs and the nature of union organising. It finds that managerialism has diffused

throughout Unison down from senior officials to regions and branches, facilitated through a new staffing structure and amended FTO job descriptions. This new staffing structure, Meeting the Organising Challenge (MtOC), added new responsibilities to the FTO job description of management of other organising staff, while portraying FTOs as managers of Unison branches (Unison 2007).

The following literature review considers explanations for union decline, perspectives on the TUC's organising strategy and sociological analysis of FTOs in the context of debates around bureaucracy and rank and file. An explanation for the research methodology adopted, consisting mainly of semi-structured interviews and focus groups based on a case study of a Unison region is then provided. The subsequent discussion of the data collated reveals tendencies in approaches by Unison FTOs (ROs) to union work which either emphasise the importance of representation (the traditional RO), or that of recruitment targets (the prototype RO) for building union organisation. It is the latter tendency which has become dominant.

### Literature review

Explanations for trade union decline tend to point to external factors, including the apparent growth of individualism within society (Storey 1995), negative employment laws (Ewing 2006), employer union avoidance strategies (Dundon 2002) and the decline in strongly unionized heavy industries (Carter and Fairbrother 1998b). However, unions also possess some capacity and ability 'to respond to and to shape the circumstances in which they find themselves' (Carter and Cooper 2002:713). Some argue that unions are partly culpable themselves by maintaining existing structures and practices which fail to reach out to workers in non-unionised sectors (see Olney 1996, Jarley et al. 1998). Furthermore, it was the attribution to union FTOs of spending too much time 'servicing', a narrative influenced by US and Australian experiences (Carter 2000), that was to be addressed through adopting the 'organising model' approach to union organising (see Heery 1998).

The organising model is 'a proactive bottom up model of collective organisation in which members constantly use innovative techniques to empower themselves' (De Turberville 2004:777) It's centrality is in the notion of union building at the workplace through the mobilisation of members internally and the promotion of grassroots activism more broadly (Heery et al. 2000:996). The TUC launched 'Winning the Organised Workplace' (WOW) training courses for affiliates based on applying the organising model as a national skills training programme. It was aimed to equip FTOs and lay representatives with the tools of best practice in organisation and recruitment. Contrasting with a 'servicing model', in which union members were largely reliant on the skills and abilities of an FTO to resolve their issues, the WOW course presented different approaches or orientations to union representation. Presenting a passive (servicing), or active (organising), approach to dealing with members grievances, the WOW courses encouraged the latter as a way of involving members and promoting union activism. Consequently, the role of union representatives,

whether full time or lay, was to support members in progressing their issues at the workplace. However, the idea that servicing was a separate function, secondary in importance to organising, became dominant. In turn, organising itself became loosely defined, and for some, synonymous with recruitment (Simms and Holgate 2008, 2010).

The proposition that the work of FTOs could be separated or compartmentalised into servicing or organising is a contentious point. Furthermore, whilst research into FTOs has been infrequent, Kelly and Heery's (1994:119) findings suggested that the organising model would be complementary to existing practice in the UK given FTOs were:

'. . . enabling rather than 'disabling' professionals . . . at the heart of their work is an attempt to establish vigorous, self-supporting and relatively autonomous workplace trade unionism'

However, as Simms et al (2013:153) identified the objectives of organising were limited to that of '. . . increasing membership'. Earlier De Turberville (2004) had noted that developing under the guise of organising was an enhanced form of managed activism including, recruitment plans, performance management techniques, workplace mapping and branch development plans: an approach consistent with the growing influence of managerialism across UK trade unions pre-dating 'new unionism' (see Heery 1996).

The promotion of managerialism through organising resonates with early analyses of trade unions. The momentum of bureaucracy was identified by S. and B. Webb (1894) in their classic analysis of the early trade union movement. The emergence of an officer class separate from the membership had significant consequences 'with the appointment of a General Secretary, and later other FTOs, the foundations for an elite or governing class were created' (S and B Webb 1894:15). The position of FTOs was later considered by Michels (1962) who saw an inevitability of union control by an elite cadre of FTOs through the necessity of organisational work. For Michels this overarching influence results in goal displacement and the gradual emergence of a ruling oligarchy. This 'iron law of oligarchy' results in organisation becoming an end in itself as Michels (1962:284) prophetically contended:

What is above all necessary is to organize, to organize unceasingly, and that the cause of the workers will not gain the victory until the last worker has been enrolled in the organization

Hyman (1971) disputed the unilinear movement towards oligarchy, arguing that while it might be an observable tendency, it is far from an iron law. However, he also noted later that 1970s' workplace reforms had produced:

. . . a stratum of shop steward leaders who have become integrated into the external union hierarchies and have at the same time acquired the power status and influence to contain and control disaffected sections and sectional stewards.  
Hyman 1989:154

These developments led to the emergence of what Hyman (1989:158) labels a semi-bureaucracy within union structures:

semi - bureaucracy might seem appropriate to designate the stratum of lay officialdom on whom full time union functionaries are considerably dependant but who in turn may be dependent on the official leadership.

The rank and file shop steward, rather than being the advocate of workplace union building, becomes conservative and resistant to shop floor pressure. Strategies that encourage membership mobilisation and activism threaten their position due to the potential for the emergence of new activists. Consequently, the seeds for distortion of organising are well rooted within union structures both within the secretariat or bureaucracy and among the 'rank and file'.

### Methodology

The aim of the research was to consider the failure of organising, how FTOs responded to the apparent shift to organising and to examine whether this was, in part at least, responsible for that failure. More generally the research was also prompted by a lack of examination of this key trade union constituency. A case study, mainly within a Unison region ('A' Region), enabled the collation of information from FTOs, their managers, other grades of union staff and lay representatives. In addition, national officials heading Unisons organising strategy were interviewed. How FTOs and others in the Unison structure perceive and interpret their work priorities and approaches are crucial in explaining success and failure. The conclusions drawn from the research are indicative of the consequences of union organising strategies for FTOs and Unison itself.

Denscombe (2010:52) contends that a case study approach provides for a focus on, "a particular phenomenon with a view to providing an in-depth account of events, relationships, experiences or processes occurring in that particular instance". Furthermore, Kitay and Callus (1998:104) observe that 'the case study is particularly well suited to researching motives, power relations or processes that involve understanding complex social interaction'. FTOs can mould or shape strategy dependant on their own objectives. The case study helps to explain why certain outcomes happen - not just what those outcomes are - and is of particular use in analysing bureaucracy given the potential for opposition and distortion of strategy (see Ackroyd and Karlsson 2014:24). It also allows for the adoption of multiple variables (in this case semi-structured interviews, focus groups, participant observation, documentary analysis and field notes) to support the research findings, whilst exploring emergent themes and potentially fruitful avenues of investigation not initially known.

The research tools adopted included semi-structured interviews with Unison FTOs, lay representatives and the aforementioned layers of Unison staff. In all 30 employees were interviewed, including 11 Regional Organisers. This activity was followed by three focus group discussions with 23 experienced lay representatives each lasting approximately two hours. This enabled capture of information from a wider group examining how organising is perceived and constructed by those with common experience. It enabled for peers to challenge or affirm data and ensured the opportunity for elicitation of points not previously considered (Bryman 2012). One focus group was external to the region and, given the similarities experienced, confirmed the case study region was consistent with the approach to organising across Unison. This process allowed for significant contribution from Unison lay representatives at the 'sharp end' of organising. It was highly relevant, given emerging differences in branch support from FTOs. Interviews and focus groups took place from October 2011 to March 2013.

On commencing the research, the Unison Regional Secretary agreed to a presentation of the research proposals at a Regional Staff Conference. The main purpose was to obtain volunteers to be interviewed. This was also an important ethical consideration (see below). It was agreed that the interviews could be undertaken in work time. Interviews with lead officials with responsibility for Unison's organising strategy were readily granted: confirming Unison as an organisation open to internal inquiry and examination. Interviews with three branch activists who gave valuable insight into their work were undertaken. A more complete insight from branch activists was obtained through focus groups arranged around Unison Steward's Employment Relations Act reaccreditation training. Respective tutors agreed to a two hour round table discussion subject to the consent of course participants. A further focus group of branch activists from a national industrial committee was arranged through the committee secretary.

The questions asked related to knowledge and experience of Unison's organising strategy and how this was applied in practice. Specific questions related to the role of the FTO, their key responsibilities, observations on changes over time and how the different constituent union parts related to each other. Questions also included approaches to industrial relations, training of staff and lay members and what are and should be Unisons priorities.

As a Unison RO I was conscious that my position would present both significant advantage and potential disadvantage undertaking the research. White (2009) warns that:

“... whilst it is impossible for a researcher to have no impact at all on the course of a research project, it is important to be vigilant against the influence of your beliefs and preferences on the research process”

White 2009:5

This vigilance is of greater importance, given the potential risk from obtaining opinions and views merely to reinforce my own on Unison's approach to organising. This led to some

urgency to seek out evidence which would challenge my perspective and provide strong counter argument. It was also necessary to ensure that a balance was observed in identifying data and drawing conclusions. Importantly the process of volunteering, as opposed to identification of potential participants, contributed to a sense of balance free from solicitation on the researcher's part. In addition, a guarantee of anonymity protected participants which may have been crucial given the sensitivity of the research.

### Findings

A number of ROs and managers recalled attending WOW training courses which introduced the contrasting models of 'Organising' and 'Servicing'. Some ROs saw relevance in the Russo and Banks 'Organising Model' but questioned the suitability of an approach to union organising based on different social cultures, traditions and systems of industrial relations:

The Organising Model I am familiar with- as it was in the WOW course- I actually ran it. They used the American example and used videos. I found it difficult as they did not reflect the type of society Britain is. I think we have moved away from that model although we put a lot of resources in for a short period.

RO5

The WOW course was where we were shown films of people disenfranchised in the United States with no rights whatsoever . . . I think there were some reservations around that because . . . we have recognition with employers, facilities time for representatives and procedures for dealing with workplace

RO1

However, it was also the view that WOW training helped support their way of working:

To be fair the Organising Model was of use. When I ran a WOW course you could see the light bulbs coming on among activists in relation to some of the thinking that came out of the course.

RO5

The introduction of WOW training was seen by some ROs as reinforcing existing approaches to union work supporting Kelly and Heery's (1994) contention that union FTOs were inherently enablers building union organisation around workplace issues:

I was a WOW Tutor. The principles of the Organising model were good but it was just reinforcing what a good Regional Organiser would be doing anyway. The thinking is here's an issue how I use that to strengthen the union whether recruiting, identifying stewards, negotiating agreements. It was second nature in many respects.

RO4



However, among managers confusion seemed to reign mainly with the acceptance of a distinction between organising and servicing:

The Organising Model I am familiar with from WOW in the comparison between organising and servicing. There was a move towards the Organising Model. In contrast the Servicing Model about representation and case work were downgraded.

RM2

Confirming an understanding that somehow organising and servicing are separate functions, Unison commenced on a journey of encouraging workplace self-organisation at a time when lay representatives were decreasing in number and requiring more not less industrial support (see below). This was not without some criticism:

There was this idea that you did not need to do servicing because members became self-organised . . . The idea that you are suddenly going to organise a load of non-members and then not do any servicing at all strikes me as nonsense

RO2

The introduction of the new staffing structure 'Meeting the Organising Challenge' or MtOC in 2007 saw new layers of full-time staff with branch organising/recruitment roles. The gradual implementation of MtOC within 'A' Region elicited mixed views among ROs. For some working with other grades was viewed positively ending an isolationist way of working:

MtOC has changed the Regional Organiser role. Traditionally I looked after branches on my own like a lone ranger approach; it is quite hard work and stressful . . . we have to take charge of some of the staff so are less hands on with branches and more directing traffic, however there are less of us as well

RO3

Some ROs were now managing small teams of staff consisting of Local and Area Organisers. The LO role was limited to matters of supporting branches in recruitment and campaigning activity. The AO in addition was also expected to undertake low level casework and support branches in dealings with employers. Given ROs were expected to be more managerial with wider remits; a void appeared in terms of Unison's ability to support members in high level casework. Furthermore, reluctance by some ROs to embrace the managerial aspects of MtOC and assert themselves as managers of union branches was apparent:

I think being a union organiser is about working with people and I think it's unfortunate that we use terminology like we are managing branches and we are managers . . . It alters the relations with branches. I am not sure this is the right way.

RO5

Nevertheless, the management of branches to achieve recruitment targets was the priority of the Unison management team (RM3):

I think the new role of the Regional Organiser is one of management . . . The distinction has to be drawn from going in to a workplace, doing lots of casework and leading odd pockets of successful negotiations. Their job is to manage four or five branches trying to make sure that organising and organisation is improving. So, they are getting more members and more stewards. My monthly one to ones with Regional Organisers is about how we turn branches to meet their recruitment targets.

On the surface these developments could be seen as a reiteration and reinforcement of Heery and Kelly's contention that the role of FTOs was the promotion of workplace self-sufficiency in collective bargaining. However anymore systematic examination belies this judgement. At a general level, UNISON's stance confirms a view that representation work delegated to lay representatives is organising, while FTO representation is servicing. In essence the difference between servicing and organising is not the manner of practice but the level of responsibility. Furthermore, even to effect the transition in Unison's terms, a large number of branch and lay representatives would have to undergo a change of role for which both their agreement and considerable training would be necessary. Neither was present, and instead, it was effectively enacted by fiat. The type of FTO required for the new practices was one who not only supports branches in attaining targets but does so through a specific managerial approach. The embrace of managerialism should not be underestimated. A Regional Secretary from a neighbouring region described the position as:

I do not see myself as the traditional Regional Secretary of a trade union more a Regional Director of a Corporation and the business of the Corporation is about recruitment and subscription levels.

This obsession with recruitment was not matched at branch level with lay activists repeatedly expressing the view that 'support, guidance and advice is what we need' (BA12). Many branch activists expressed concern and frustration that their priorities were being overridden by Unison management:

I bring issues up at region (not 'A' Region) and they don't seem interested it's all 'we will get someone along to help you recruit.' When I want support on particular issues . . . I don't want a conversation about recruitment.

NA1

This disconnection between Unison branch and regions was also evident in 'A' region with the following typically representative:

We have had no support from region at the time of the TUPE transfer . . . since the privatisation there has been some more presence but what they focus on is organising which consists of workplace meetings to recruit and not support for us in cases and dealings with our new employer.

BA20

Often branch activists were also unclear as to their role and that of ROs:

I am not sure what the role of the Regional Organiser is. By that what I mean is I can end up dealing with disputes, consultations and redundancies but I am not sure where my boundary is where is the demarcation between branch and region.

BA15

The criticisms expressed were not all in the direction of branch to region. Often ROs' experience resonated with Hymans (1989) observation of the development of lay bureaucracy. This was exacerbated by the promotion of partnership agreements with employers:

The real union bureaucrat is the Branch Secretary who gets wrapped up with management in a cosy relationship. For me partnership agreements inhibit our organising work and this is not grasped by our (Unison) management.

RO3

The Reps can get sucked into thinking that what being a trade union rep is about is going along to all these partnership forums and getting all these important papers from management, sometimes under non-disclosure terms. . . The union role is partly to manage the employee relations but we are there primarily to represent the members.

RO2

As RO4 observed:

I don't think branches embrace the Unison organising agenda as all they are asked to do is recruiting. . . Branches and members still focus on the service they get when they need help. Now that service can turn into an organising and recruiting opportunity but without delivering the service all else is lost.

The Trade Union and Labour Relations (Consolidation) Act 1992 narrowly defines the principal purpose of trade unions as ' . . . the regulation of relations between workers . . . and employers or employer associations' (quoted in Dundon and Rollinson 2011:131). Unison's organising strategy fails to address workplace regulation despite some acknowledgement of the importance of representation:

McDonalds makes money by selling burgers, Tesco's makes money by selling everything, Unisons job is to represent people through individual or collective representations, that is what we are about, that is what we are there for.

RM3

Whilst recognising the centrality of representation to union work the view of Regional Management was this work should shift to branches and away from FTOs:

Regional Organisers are more comfortable doing representation because that is what most of them do. I think everybody works in a certain way and we just have to try and change that

RM3

However, this ignored both the reality of traditional RO work and the major shortfall in Unison representatives which according to a senior manager:

. . . The number of representatives has declined over the last 10 years from 60% coverage of the workplace to 46%. The evidence is there that one out of two workplaces does not have a Unison representative.

NM1

This data confirms the failure of Unison's organising strategy with over 50% of recognised workplaces without a basic level of organisation through a workplace Unison representative.

The challenge to provide support for members is apparent. Yet the shift to organising created a perception or belief that servicing of members was not a priority. The choice of prioritising recruitment had two consequences. First was the delegation of representational work to branch level. Second was given ROs were to emphasise organising and not servicing in their work, the requirement for industrial relations expertise for newly appointed ROs was no longer essential. Consequently, the emergence of a new type RO, or prototype, saw the RO role through management eyes:

The role is to ensure they (branches) are running smoothly, to get systems in place so the branch can stand independently and is well organised and to support by meeting weekly with the Branch Secretary. If they have staff in the branch **helping manage staff properly so that the resource is used efficiently** . . . I also make sure there are good office systems in place and more generally good management of the Branch office. This includes recruitment support and a representative database so cases, training, and facility time reports are easily available.

RO8

Whilst the emphasis remains on supporting branches, the nature of that support is in administrative systems and general office management. A discourse of efficient use of resources exemplifies a 'management speak' alien to union branches and not within common narratives of union work among traditional ROs.

Resistance to such an approach to union work was evident and emerged with branch and workplace level priorities and came out of a genuine concern for union members and the future of their union:

We are put under pressure by Region to get the recruitment figures so when we meet with branches, we need to talk about what the branch is doing about recruitment but the branches naturally want to talk about their issues.

RO9

. . . There is still the expectation from branches that you will be available to give high level advice on negotiations and employment law situations. Most branches still expect you to become directly involved in high level negotiations . . . The amount of case work you do varies enormously depending on the branch in terms of activist experience and ability.

RO2

This traditional type of RO was ready to accept the importance of recruitment, but not for its own sake:

Large sections of (Unison) management seem to understand recruitment as organising. . . I see organising as partly recruiting but around issues which is a more moral way to recruit . . . you tend to get people involved rather than just signing them up and your need for representatives becomes self-evident.

RO2

As another RO lamented:

In a sense the ultimate judgement of success is focused on recruitment . . . whether we have got good terms and conditions for our members has taken lesser importance.

RO1

The appointment of new ROs suitable for the prototype approach caused one branch activist (NA3) to comment 'I feel like that Unison is looking to recruit bright young things who can sell the union like an insurance policy'.

This emphasis on recruitment was prominent at team meetings where the agenda no longer presented an opportunity to discuss and determine common strategy on industrial matters but was limited to addressing progress on team recruitment targets, had they been achieved and how could the team improve recruitment. The agenda also prevented new RO's benefitting from more experienced colleagues:

The team meetings don't address the issues we are dealing with. . . We no longer have service group meetings which I found very valuable because we discussed the issues which all of us were facing and allowed us to develop common strategies and approaches. There is a total disconnecting between National and Region

RO4

Even prototype ROs recognised the importance of industrial work and the lack of managerial support:

The new manager wanted to look purely at an organising agenda, but it was frustrating when you wanted advice on cases and the response was go to the solicitors, give them a call, but they have no experience in dealing directly in the workplace.

RO8

Lack of experience combined with minimal management support caused moments of high stress and anxiety as one traditional RO recalled:

I remember the appointment of a Regional Organiser who had never run an individual case in her life. How that person was supposed to advise lay representatives and members on issues was amazing given that person had no industrial relations experience at any level. I used to meet with her to discuss cases because she did not know how to deal with them and I would find her in tears.

RO4

Yet it would be the new RO who would be later considered more suitable for mentoring and supervising new staff suggesting a process of career advancement conditional on preferred managerial approaches to RO work.

The respective organising teams have dedicated recruitment weeks focusing on a large branch or County area, with up to fifteen organising and administrative staff positioned around a recruitment stand, normally based in a staff canteen or other prominent position in workplaces. The recruitment approach is based on potential members being encouraged to join Unison with the chance to enter a free raffle to win prizes e.g. televisions, iPad etc. Frequently ROs will be in workplaces they do not cover without any brief about current issues.

There are times when I worry that what Unison is organising for is its own existence . . . We go about setting up canteen stalls to recruit for the purpose of recruiting . . . not addressing issues our members face. . .

RO2

The periodic recruitment weeks saw management control the work of the RO. An attempt by Regional Management to achieve overall control of the work of the RO, and other organising staff, was made with the imposition of new working methods. 'Operation

Workplace’, or as one RO with a dissident view put it ‘Operation Workload’, was introduced without consultation with organising staff. It required organising staff, including ROs, to arrange for three workplace visits a day to talk to members and non-members about their working lives. A form was devised to be completed and returned giving data on where the visits took place, how many staff attended and the number of new recruits. It became an exercise in form filling. After the launch meeting there was strong opinion expressed on the merits of ‘Operation Workplace’ with one RO commenting:

It’s alright doing three workplace visits a day, I would love to but when do we deal with the issues these three visits identify, when do we do the support work the branches want, when do we manage the staff and when do we have time to think.

Adding to the burden of bureaucracy the RO had not factored the time to make arrangements for these 15 workplace visits per week. Nevertheless ‘Operation Workplace’ was claimed by Regional Management to be a success. During the six-month period to the 2013 year-end Regional Management had recorded organising staff having visited 757 workplaces, recruited 353 new members, held over 7000 conversations and identified 116 new or potential workplace leaders (‘A’ Region report 2013)! However, such data is misleading given the legitimacy of the returns was questionable. A member of the administrative staff recognised that the form filling was merely a pointless exercise in which organising staff were recording both their normal activity and that of lay representatives. There was no increase in subsequent take up of Unison steward training. Indeed, there were no logistical plans for anticipating increased demand for steward training for the ‘116’ by expanding the number of prospective training courses. ‘Operation Workplace’ was modified and at a review session for organising staff and managers much debate ensued. Regional Management attempted to limit the review to the detail on the report form. Nevertheless, a vocal minority offered a critical assessment of the whole approach and in doing so reinforced their lack of belief that on major issues their voice carried weight. A traditional RO view summed up the exercise as a classic example of managerialism and bureaucracy:

What is the point when you fundamentally disagree with the management telling them that they are wrong, they have to be seen to be doing something? Form filling is a godsend for union bureaucracies; as long as they have forms to look at then they are all happy.

The exercise also resulted in problems between Region and Branch activists later acknowledged in the management report with the failure to obtain buy in by lay representatives who also felt undermined:

Branch activists feeling undermined or guilty or resentful of regional staff undertaking visits in “their” workplace, without their knowledge, and/or regional organising staff feeling annoyed or frustrated by lay activists not engaging in the planning or undertaking of visits in their own workplace or branch.

Unison ‘A’ Region management report 2013

However, it was a Unison NHS Branch Secretary who summed up the frustration and folly of the whole exercise:

I don't know what the fuck's going on at Region. We are dealing with redundancies, restructures, bullying, short staffing and they (hospital management) are trying to attack our terms and conditions and Region wants us to organise meetings to find out what is going on.

One of the consequences of 'Operation Workplace' was to make it evident to branches the management approach traditional ROs were resisting:

. . . I think now there is a real disparity between what the activists want from their RO and what the organisation wants to be doing. I think they (the national union) have broken away.

Management enthusiasm for 'Operation Workplace' evaporated, confirming the dubious nature of its apparent success. What it did illustrate was a disconnection with different union constituencies, Regional Management to organising staff and some regional staff with branches, suggesting a significant challenge to future organisational vitality.

### Discussion

Earlier research into FTOs (Kelly and Heery 1994) identified their main responsibilities as collective and individual representation through workplace negotiations, defending union members at disciplinary hearings and supporting grievances through internal employer procedures. In Unison this has become secondary to recruitment, Unisons number one priority. Yet over 50% of workplaces in which Unison is recognised have no representatives. Traditional Unison ROs confirmed their tendency to support and enable lay representatives and members to greater self-reliance through improving workplace organisation on the back of workplace issues, consistent with Kelly and Heery's (ibid) findings. However, this approach to organising work is not required by Unison management who see the management of branches, delegation of representational work and prioritising recruitment activities as key.

The introduction of MtOC staffing structures sees an attempt at an extension of managerialism by consolidating the RO into a new layer of Unison management, primarily engaged in managing other staff and branches. The priority is in achieving nationally set recruitment targets. Traditional ROs acknowledged resistance to such changes and highlighted the continued importance of dealing competently with branch workplace issues for union relevance and vitality: a contention supported by recent research by the ETUC that confirmed retention of union membership is largely due to the role played by union representatives at the workplace (Waddington 2014). RO withdrawal from representation work reduces further capacity for member representation or support, exacerbating the challenges facing a dwindling lay representative constituency, itself further evidence of strategic failure.



The anticipated congruence of differing union constituencies through organising has not occurred. Instead Unisons organising approach has led to the heightening of the identification of differing interests and priorities within union constituencies. The dominance of recruitment priorities of union management over those of local activists in dealing with industrial and other representational matters undermines the rationale for union membership. Organising approaches have weakened the ability of Unison to meet longstanding challenges emerging from the introduction of individual workplace rights. Exacerbating this position, new FTOs are no longer required to have as essential significant industrial experience. What is desired by Unison management are strengths more associated with campaigning and recruitment. Describing such staff as prototypical is warranted as they appear to represent the future. As originally envisaged in WOW training, the connection of workplace issues with organising is the tendency of the traditional RO. Ironically more akin to an orientation based on the organising model.

### Conclusion

The introduction of a new organising approach, influenced by US and Australian experience, came at a time of growing recognition that trade unions needed to improve management of their resources in the continuing cold climate of UK industrial relations. The most influential approach, originating in the US and stemming from the SEIU, has been criticised for its centralised control and its undemocratic managed activism (Early 2009, McAlevey 2012). However, particularly initially, it did mobilise members. The organising approach adopted in Unison is 'managed recruitment' where rather than enhance participative trade unionism around grassroots membership issues, such matters are now secondary. Recruitment becomes the barometer for measuring union success, in contrast to collective bargaining gains, individual representation outcomes and broader signs of influence. The promotion of organising has thrown light on inherent internal differences and competing priorities within trade unions, with national objectives often overriding those of the grassroots membership. In the middle are FTOs facing a choice of emphasis, recruitment or representation?

Rather than become a long term strategy for union renewal, organising has been distorted to the short term objective of achieving nationally set recruitment targets. Some FTOs, whilst portrayed as an obstacle to union renewal, undertake crucial industrial work and attempt to achieve stronger and more self-reliant workplace organisation. They have resisted subordination to national priorities in favour of both the immediate industrial interests of the grassroots membership and the longer term viability of their union. To describe their approach to be one of conservative resistance is mistaken given it is driven by member expectations and the demands for support from the union 'rank and file'.

Responses to Unisons organising strategy have identified the position of FTOs as separate from the union secretariat, required to be managed and develop institutional priorities over those of the grassroots membership. Their privileged position is not evident given they are subject to line management with objectives and performance targets based on recruitment.

Yet FTO resistance to managerialism through organising has a positive effect on union vitality given it militates against the failure to develop a sustainable organising strategy. The approach of traditional FTOs throws light on the reasons for strategic failure of trade unions. Whilst the research was undertaken several years ago the practices and approach to organising remain highly influential within Unison. Since the completion of the research the prototypical approach has become increasingly embedded at the expense of the traditional industrial relations based focus in FTO work. The extent of this process would be a useful and important topic for further research. Furthermore, without a change in strategy trade union renewal in the UK will remain elusive.

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