

Organising and delegates: An overview

David Peetz and Barbara Pocock*
Griffith University, University of Adelaide*

ABSTRACT

Using a survey of 2350 current workplace delegates in eight unions, we examine the workplace capacity of union delegates. Delegates like their role, but it is becoming harder as more things are being asked of them. The majority are trained, but more training is required if they are to be able to manage the wider range of tasks that unions expect of them. Support for delegates provided by the union office is fairly good, but weak in some areas, particularly in developing networking skills. Delegates are very reliant on their organiser. Management opposition is a problem for a minority of delegates, but it is a growing problem. Delegates have great trouble persuading fellow unionists to share the burden of union activities. Activism is increasing, but from a low base. They appreciate some of the principles of organising, but a wholehearted embrace of organising is still a long way away.

Introduction

If there is one group of people who are central to the progress of the Australian union movement's renewal, it is workplace union delegates. The 'organising' strategy that has gained increasing salience in Australian union circles, as it has amongst some unions in the US, Canada, New Zealand and the UK, embodies a pivotal role for workplace delegates in activating members and reviving union membership (Bronfenbrenner *et al.*, 1998; Carter & Cooper, 2002; Findlay & McKinlay, 2003; Erikson *et al.*, 2002). This literature emphasises the essential role that workplace activists play in recruiting new members, creating a strong positive profile for unions in the workplace and leading local activism. These delegates thus play a vital role in releasing organisers and other full-time union officers to increase organising effort in non-unionised sites. Yet little in the way of systematic data on delegates has been collected here since the second Australian Workplace Industrial Relations Survey in 1995 (AWIRS95) (Morehead *et al.*, 1997). This paper presents the first cut of results from the largest survey of delegates undertaken in recent years in Australia.

Background

Data presented here come from a survey of 2506 current and former workplace delegates undertaken in late 2003 and 2004. Of those, 2350 were current workplace delegates, the remaining 156 were former delegates. The data reported here come from the 2350 current delegates (hence $N=2350$, minus "don't knows", in the tables). Delegates were surveyed in eight unions: the Australian Education Union (AEU), Australian Manufacturing Workers Union (AMWU), Australian Services Union (ASU), Community and Public Sector Union (CPSU), Independent Education Union (IEU), Liquor Hospitality and Miscellaneous Workers Union (LHMU), National Tertiary Education Union (NTEU) and Rail, Tram and Bus Union (RTBU). Approximately 325 current delegates were surveyed in each of seven of the eight unions, with a smaller number coming from the RTBU because of its smaller membership base. Delegates were selected using systematic random sampling from lists provided by unions (mostly state branches). Interviews were conducted by telephone by the ACTU Call Centre, Member Connect. Interviewers were briefed by the researchers before hand on the survey instrument. The refusal rate was low, generally below 10 percent.

We generally phrased questions about the union in terms of their (state) branch or division of the union, as this was the key operational level of the union with which delegates had interaction.

Respondents had been delegates for an average of 6.3 years, with 13 percent having been delegates for 12 months or less. In 44 percent of cases, the respondent was the only delegate at the workplace; 20 percent had a coordinating or leadership role in relation to other delegates at the workplace; and 35 percent were in workplaces with multiple delegates but did not have a coordinating role (including 7 percent who were in workplaces where no-one had a coordinating role).

Role of the delegate

Given that it is a volunteer position, it is not surprising that the majority (65 percent) of delegates enjoy being a delegate. However, 17 percent report that they are less satisfied with being a delegate than two years earlier, whereas 27 percent report being more satisfied. In response to a series of statements, slightly more than half indicated that they are able to take time off work to do union activities (Table 1), and two thirds feel have a sense of self-efficacy, and feel that that by being a delegate, they can really make a difference to what happens to people where they work.

TABLE 1
Attitudes to
being a
delegate (%)

	<i>strongly disagree</i>	<i>mostly disagree</i>	<i>neutral</i>	<i>mostly agree</i>	<i>strongly agree</i>
I enjoy being a delegate	2	5	27	40	25
Doing union work takes up too much time	19	31	25	17	8
I am allowed to take paid time off work to do union activities	23	10	13	25	30
By being a union delegate, I can really make a difference to what happens to people where I work	3	9	21	40	27
It is clear to me what is expected of me as a delegate	2	10	15	44	30
This branch of the union puts too much responsibility onto delegates	24	38	23	11	4

Note: numbers sum to 100% across the rows, subject to rounding.

There are also negative signs: 15 percent feel that the union puts too much responsibility onto delegates, 25 percent think doing union work takes up too much time, 30 percent say it has become more difficult to perform their role as a delegate in the past two years, and 42 percent say that the range of tasks expected of them in their roles as delegates have increased (Table 2). This is in the context of 79 percent reporting that the workload in their job has gone up

TABLE 2
Changes in the
role of delegate
(%)

	<i>gone up</i>	<i>stayed the same</i>	<i>gone down</i>
your workload in your job	79	18	4
the range of tasks expected of you in your role as a delegate	42	55	3
how difficult it is to perform your role as a delegate	30	62	8
how satisfied you are with being a delegate	27	57	17

Note: numbers sum to 100% across the rows, subject to rounding.

Delegates were asked who did most of the recruiting in their workplace. Some 76 percent said delegates did, and another 11 percent nominated other members. Only 7 percent said organisers and 3 percent said the employer did. Despite differences in the samples, this appears to represent an increase in recruitment by delegates over the past decade: in AWIRS95, when only 64 percent of senior delegates reported that they did any recruitment (Morehead *et al.*, 1997).

Training

An important factor in promoting organising approaches, and indeed in promoting activism (Peetz, Webb & Jones 2002), is training. There were, however, many delegates who had not been formally trained at all. Only 62 percent of delegates had received any training. Some 31 percent of delegates who had been a delegate for three or more years had not been trained. Indeed, almost half of delegates who had not been trained had been delegates for over three years. Delegates who had been trained were more likely to say that the range of tasks they did had widened and their role had become more difficult – but they were also more likely to say that they were more satisfied, enjoyed being a delegate and could really make a difference.

For the average trained delegate, the year of last training had been 2000, that is at least three years before the survey. Training covered a range of issues. As shown in table 3, slightly over half of delegates had received general introductory training, two fifths had been trained in recruitment techniques, and smaller numbers had been trained on other issues such as developing networks and campaigning skills.

Generally speaking, delegates regarded their training fairly well. Asked on a five point scale (from 1 to 5) to rate the usefulness of their training, they gave it an average rating of 4.07, with 21 percent of trained delegates giving the highest rating of 5 (very useful) and only 2 percent giving a rating of 1 (none of it was useful) or 2. Delegates who had received training in campaigning skills gave their training the highest overall rating of 4.19. Delegates who had only received introductory training gave it a relatively low (though still positive) rating of 3.83.

TABLE 3
Formal training
received (%)

Introductory	52
Recruitment techniques	40
Promoting activism	39
Communication skills	39
Grievance resolution	37
Enterprise bargaining	37
Occupational health	35
Managing meetings	33
Developing networks	32
Campaigning skills	31
Other training	15

Support

Union offices provide a variety of support to their delegates. We asked delegates to rate, on a scale of 1 to 5, how effective several types of support were for them (Table 4). Overall, 24 percent of respondents described the overall level of support the union gave them as being ‘very effective’, and 8 percent gave one of the lowest two ratings. The average rating was 3.91. Unions were rated strongly for giving support in relation to supporting industrial action and providing news and information, and not so strongly for keeping in contact or making training available. In a separate question, 58 percent of delegates (including 60 percent of female delegates) agreed that their branch of the union paid a lot of attention to women’s issues amongst its members.

There were general signs of improvement, with 37 percent saying that the support they got from the union office had gone up in the past two years, although 8 percent said it had gone down.

Nonetheless, there was still a sense of crisis about the union amongst a minority of delegates: 27 percent agreed (and 58 percent disagreed) that if their branch of the union does not do things differently, it will eventually disappear.

TABLE 4

Ratings of support provided by union to delegates (%)

	1 (not at all effective)	2	3	4	5 (very effective)	mean
supporting industrial action	2	4	14	34	45	4.16
providing news and information	1	5	16	38	40	4.10
providing advice and expertise	3	7	20	39	31	3.89
directly dealing with individual grievances	4	7	21	38	30	3.82
speedily responding to an issue	4	8	22	37	29	3.79
keeping in contact with me	6	12	21	32	28	3.64
making training available	8	14	25	29	25	3.50
showing me how to develop networks of people who can help me	14	23	33	21	9	2.89
overall rating of support	2	6	22	46	24	3.91

Note: numbers sum to 100% across the rows (excluding last column), subject to rounding.

Networking

An important source of support for delegates is the networks they develop – with union staff, other delegates and members. A majority (51 percent) agreed they had a lot of contact with other delegates at this workplace (35 percent disagreed). However, only 23 percent agreed (61 percent disagreed) that they had a lot of contact with delegates from their own union in other workplaces, and only 12 percent agreed (78 percent disagreed) that they had a lot of contact with delegates from other unions. There were some signs that delegate networking might have been increasing: 28 percent said they were now working more closely with other delegates than two years earlier (11 percent said less closely). Nonetheless, unions were rated very weakly in showing delegates how to develop networks of people who can help them (Table 4). On this, which was their worst item, 30 percent rated unions well but 37 percent rated them poorly.

More important for the majority of delegates was contact with their organiser. We asked respondents who was the one person, whether they were inside the union or out of it, who was the most use to them in terms of helping them do their job as a delegate well. Results (shown in Table 5) indicate that for half of respondents this person was the union organiser.

TABLE 5

Most helpful person for delegates (%)

union organiser	49
someone else from union office	12
an official from another union	1
<i>Subtotal – paid union officials</i>	62
another delegate in this workplace from this union	9
senior delegate at this workplace in this union	7
another member from this union in this workplace	6
a delegate from this union from another workplace	2
another delegate in this workplace from another union	1
a member from another union in the workplace	0.3
<i>Subtotal – delegates and members</i>	25
a friend or relative from outside the workplace	2
manager in workplace	1
someone else	6
No-one	5

The second most common response was someone else from the union office. In total, 62 percent cited paid union officials as being the most helpful person to them. Only 25 percent referred to other delegates or members – mostly from their own union at the same workplace. Noone was helpful for 5 percent of delegates.

If union organisers were the most important person for delegates, many were not seeing them very often. While 26 percent said they had personal contact with their organiser three or more times a month, for 39 percent it was less than once a month (Table 6). Contact with anyone else from the union office was even rarer, with only 13 percent having such contact three or more times a month, and 68 percent having such contact less than once a month. There were clearly mixed views on organisers, with 44 percent agreeing that their organiser had taught them many valuable things about being a delegate, but 32 percent disagreeing.

TABLE 6
Contact with
union office
(%)

	<i>5+ times per month</i>	<i>3 to 4 times</i>	<i>once or twice</i>	<i>less than once a month</i>	<i>never</i>
an organiser	13	13	36	29	10
anybody else from the union office	7	6	20	35	33

Managerial opposition

While managerial opposition to unions is important to explaining union outcomes, few data have been collected on what level of management is most hostile or matters most. We asked respondents how they would categorise their supervisor's attitude, and their company's or organisation's attitude, towards them. They received more support from their immediate supervisors: 54 percent of whom were considered supportive and just 14 percent hostile. By contrast only 38 percent of their organisations were considered supportive and 23 percent hostile. While this overall appears to be a favourable environment for delegates, some 22 percent reported that management opposition to their role as a delegate had gone up over the past two years, whereas opposition had declined for just 10 percent. This increased opposition appeared to be coming from both levels, though the correlation was stronger with supervisor's opposition (Pearson $r=.32$) than with organisational opposition ($r=.25$). However, outcome variables seemed to be more related to the attitude of the organisation than of the supervisor.

Activism

While delegates felt personally involved in the union – 51 percent agreed with this proposition, while 23 percent disagreed – they perceived considerably less involvement from their fellow members. Only 33 percent agreed, and 45 percent disagreed, that members in their workplace were generally active. This was also reflected in the burdens on delegates – only 27 percent agreed they found it easy to get other members to help share in union tasks, while 54 percent disagreed. There were positive, albeit mixed, signs about change: 30 percent said that activism amongst members had increased over the past two years, while 22 percent said it had decreased.

We asked delegates about whether certain things stopped them becoming more involved in the union. The single most common obstacle was the delegates' own workload. Other significant obstacles included lack of confidence or training and insufficient support from members, along with a preference for doing something else in their spare time or family responsibilities.

TABLE 7
Barriers to
activism (%)

My workload prevents me	62
I don't feel as confident or well trained as I'd like to be	49
I don't get enough support from members	46
I'd rather do other things with my spare time	45
My family responsibilities prevent me	35
My boss is an obstacle	25
Not enough support from the union office	17
Are there any other barriers we haven't mentioned?	25

Consultation and democracy

There were mixed views about democracy within unions though overall a positive outlook. Only 22 percent complained that there was not enough consultation with members before decisions were made, and three fifths thought members had a lot in say in determining the content of an enterprise bargaining claim. Nearly half agreed (and nearly a quarter disagreed) that delegates had a lot of influence in the branch. Some 24 percent indicated that the amount of influence members had in the union had gone up over the previous two years, and just one in ten said it had gone down.

TABLE 8
Attitudes to
democracy in
their union (%)

	<i>strongly disagree</i>	<i>mostly disagree</i>	<i>neutral</i>	<i>mostly agree</i>	<i>strongly agree</i>
There is not enough consultation with members before decisions are made by this branch of the union	27	31	20	16	6
delegates have a lot of influence in this branch	7	15	30	35	12
In an enterprise bargaining campaign, members here have a lot of say in determining the content of the claim	6	15	18	36	24

Note: numbers sum to 100% across the rows, subject to rounding.

Power and unionisation

On average, delegates reported that union density was about two thirds amongst employees in their part of the workplace, though for about a third density was less than fifty percent. Some 58 percent of delegates agreed that the union had power in the workplace (20 percent disagreed), and likewise 62 percent agreed that the last round of enterprise bargaining here produced outcomes that members were happy with (19 percent disagreed). These items were strongly correlated ($r=.35$). Again, there was a general view that these things were improving for unions, but with some setbacks. Thirty five percent estimated that the level of unionisation in the workplace had increased over the preceding two years, while 19 percent perceived a decrease. On another measure, 46 percent reported an improvement in the success rate of their union on issues at their workplace, and just 11 percent reported a decline.

Visions of unions

We also wanted to test delegates' visions of the type of role they should have as delegates, and the type of role they thought unions should have. We did this by putting a series of contrasting propositions to respondents, and asking them to choose which one out of each pair

they preferred. We did not explicitly offer them the choice of selecting both as being equally important, but recorded it when they gave this as their preferred answer.

To investigate their view about whether delegates should represent the union to the members, or vice versa (cf Batstone, Boraston & Frenkel 1977), we asked 'In your view is it more important for you to *tell the members* about what the *union is doing*, or for you to *tell the union* about what the *members think*?'. Twice as many preferred the latter (upward) to the former (downward) approach, though the greatest number gave both equal importance (Table 8).

We also sought to analyse their orientations towards 'organising' versus 'servicing' approaches ('organising' referring to a union strategy that emphasises the mobilisation and activism of members and active member-to-member recruitment, while 'servicing' refers to the union tradition whereby full-time officials 'service' members and 'care for' them, rather than drawing them into active union engagement). To this end, we asked them whether it was 'important for you to *know who to contact* in the union office to get a member's problem *solved quickly*, or for you to *know how to organise* a workplace campaign around members' problems?'. Here the strong majority gave the servicing response – they wanted to know who to contact to solve the problem. Only one in six thought it more important to know how to organise a campaign – yet these were the delegates who were more likely to report increases in unionisation (41 percent did so, compared to 33 percent of delegates who thought it more important to know who to contact). Delegates who considered campaigning more important were also more likely to report increases in activism (39 percent, compared to 27 percent amongst delegates who preferred knowing who to contact) and in the union success rate at the workplace (52 percent v 44 percent).

TABLE 9
Visions of
their role as
delegates (%)

Choice 1		Choice 2	
tell members what union is doing	19	know who to contact	69
tell union what members think	38	know how to organise campaign	17
no difference/ both equally important	42	no difference/ both equally important	13
don't know	0.4	don't know	1

Note: numbers sum to 100% down the columns, subject to rounding.

We also asked them four questions choosing between alternative scenarios of what the role of the union should be. One of these looked at another aspect of the organising/servicing dichotomy, and this time found a strong orientation towards the organising approach. Thus only 10 percent thought a union should stick to providing services to its present members, but an overwhelming 72 percent thought it should also focus on membership and delegate education and on organising and recruiting unorganised workers. Of course, delegates themselves would be beneficiaries of the latter focus.

Delegates tended to have a broad view of the scope of unions' responsibilities and methods. On responsibilities, we found that 38 percent considered that a union should stick to representing its current members, but 52 percent considered it should also advance the interests of all workers. On method, we found that only 38 percent thought a union should stick to representing its members to their employers, but 44 percent thought it should also be active in political issues.

Finally, though, we found a reprise of the notion that was evident in Freeman and Rogers (1999) study of American workers, a continuing belief in the common interests of employers and employees: 73 percent considered a union should emphasise the common interests of employers and employees, while only 15 percent thought it should instead promote its own separate agenda. The majority view here, which was no less common amongst delegates in blue collar than white collar unions, was unrelated to whether management opposition to their role as a delegate was increasing or decreasing. While it was more common amongst delegates who saw their company as being supportive, it was still a majority view amongst those who considered the company's attitude to be hostile to them. This finding reflects the ongoing contradictions arising from the coexistence of cooperation and conflict in the employment relationship, and a view that unions

should pursue an agenda that represents the views of the members rather than the views of paid officials in the union office. The data on consultation and democracy discussed above suggest that members' interests in greater responsiveness of unions to the wishes of their members are increasingly being served.

Discussion

Less than a decade ago, Australian unions were in what could reasonably be described as a parlous position. Workplace organisation was intermittent, uneven and often ineffective. Unions were easy targets for employers. These data do not represent a comparative study over time, but the picture they paint is consistent with the view that workplace unionism is moving in the right direction, even if significant problems remain.

Delegates like their role and they feel that it makes a difference. But their job is becoming harder as more things are being asked of them. The majority of them are trained, but more need to be trained, if they are to be able to manage (and enjoy!) the wider range of tasks that unions expect of them. Support for delegates provided by the union office is fairly good, but is a barrier to further involvement in the union for one in six delegates. This support is weak in some areas, particularly in developing networking skills. Delegates are overly reliant on their organiser, and some organisers (it would appear, a minority) are not seen as being effective enough in teaching delegates important skills and probably do not or cannot keep in contact with them often enough. Management opposition is a problem for a minority of delegates, but it is a growing problem. Delegates tend to feel personally involved in the union, but many have great trouble getting their fellow members involved and persuading them to share the burden of union activities. Activism is increasing, but from a low base. Member and delegate involvement – union democracy – is improving, but still has some way to go. So too with union power, and union wins at the workplace. Delegates tend to take a broad view of unions' responsibilities and methods. They appreciate some of the principles of organising, including the need for developing delegate structures, and are implementing them, but a wholehearted embrace of organising is still a long way away, with most delegates preferring to know who to contact to get a problem solved than knowing how to organise a workplace campaign around members' problems.

From the point of view of progress towards the development of an 'organising' approach, these data suggest unions still have many problems at the workplace, but the picture is far from bleak. Over the coming three years unions, and Australian workers, will face probably the biggest challenges since the Great Depression, with a conservative government in office committed to radical industrial relations policy 'reform' and with control of the Senate enabling it to pass new legislation unconstrained. Had unions faced these challenges in the mid to late 1990s, it is likely many would have folded altogether, as some of their counterparts in New Zealand did earlier in that decade. The picture here implies that unions now are moderately equipped at the workplace. There is still much for them to do – and with some urgency, in the current political climate – but it is not a task that seems beyond them.

References

- Batstone, E, Boraston, & Frenkel, S J (1977) *Shop Stewards in Action*, Blackwell, Oxford.
- Bronfenbrenner K *et al* (eds) (1998) *Organising to Win*, ILR Press, Ithaca.
- Carter, B & Cooper, R (2002) 'The Organising Model and the Management of Change: A Comparative Study of Unions in Australia and Britain', *Relations Industrielles / Industrial Relations*, 57(4), Automne/Fall 2002, 712-742.
- Erikson, C.L., Fisk, C.L., Milkman, R., Mitchell, DJB, & Wong, K (2002), 'Justice for Janitors: Lessons from Three Rounds of Negotiations', *British Journal of Industrial Relations*, 40(3), September, 543-567.
- Findlay, P & McKinlay, A (2003) 'Union Organising in "Big Blue's" Backyard', *Industrial Relations Journal*, 34(1), March 2003, 52-66.
- Morehead, A, Steele, M, Alexander, M, Stephen, K & Duffin, L (1997) *Changes at Work: the 1995 Australian Workplace Industrial Relations Survey*, Longman, Melbourne.
- Peetz, D., Webb, C. & Jones, M. (2002) 'Activism Amongst Workplace Union Delegates', *International Journal of Employment Studies*, 10(2), October, 83-108.