

Part III

Training and Union Renewal



8 American Unions and the Institutionalisation of Workplace Learning

Innovations for New Work Systems and Labour Movement Renewal

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INTRODUCTION

This chapter provides an overview and assessment of how individual American unions and the American Federation of Labor and Congress of Industrial Organizations (AFL-CIO) have experimented with non-traditional member services and innovative collective bargaining provisions related to the institutionalisation of workplace learning. The programs outlined here demonstrate that many U.S. unions have come to regard the establishment of workplace learning systems and strategic involvement in community-based workforce and economic development initiatives as activities with the potential to achieve positive sum outcomes: helping their members attain employment security and adjust to the demands of a precarious labour market while increasing the capacity of receptive employers to implement high-performance work systems. To paraphrase Streeck (1993), skill formation has become a central issue in union approaches to Industrial Relations (IR), signalling union and worker willingness to share responsibility for the successful productive performance of enterprises and effectively imposing on management a *social obligation to train* that stands to benefit incumbent workers and firm productivity. Union sponsorship of workforce development programs can also play a democratising role, helping to give members the discipline, knowledge, and self-confidence to become more engaged in production decisions and the internal affairs of their unions (Kemble 2002).

The chapter begins by framing the institutionalisation of workplace learning in the context of America's market-based model of VET and its decentralised IR system. The unions' turn toward workplace learning is seen as a response to turbulent labour market conditions and a decline in union density. The next section presents five categories of union-involved workplace learning initiatives, describing notable programs and linking them to the construction of new work systems. The final section speculates that the establishment of union-involved workplace learning programs

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1 creates structures that make unions more appealing to young workers and
2 low-wage immigrant employees.

3 Underlying the analysis here is the perspective that the institutionalisa-
4 tion of union-involved workplace learning programs represents a *power*
5 *resource*, a means for unions and workers to increase control over the use
6 of their human capital (Korpi 1983) by exerting greater influence over skill
7 formation and the application of occupational skills to production pro-
8 cesses. As these programs have become institutionalised at the workplace,
9 they have provided opportunities for workers to gain (and upgrade) occu-
10 pational skills in a manner that enhances their employment security while
11 contributing to firm productivity and overall organisational performance
12 (Ogden 2007).

13 Encouraged by leaders of the American labour movement (AFL-CIO
14 1994a), these programs signal that unions have the capacity to take on both
15 productive and distributive functions in enterprises (Streeck 1993) and
16 address the firm-level productivity concerns of employers (Thelen 2001).
17 Union-involved workplace learning programs represent instances of *strate-*
18 *gic intervention*, both (a) at the point of production in work practices previ-
19 ously reserved for management personnel and (b) into regional economic
20 and workforce development initiatives generally directed by business asso-
21 ciations and public agencies. This in turn creates new institutional oppor-
22 tunities for unions, building a foundation for labour revitalisation based
23 upon ‘a policy of negotiated general upskilling, conducted and enforced
24 in *cooperative conflict* with employers and in *creative partnership* with
25 governments’ (Streeck 1993, 185) and community-based organisations. As
26 unions institutionalise workplace learning systems through collective bar-
27 gaining, they contribute to structuring the cooperative conflict between
28 union and management in a manner that enhances union influence over
29 work practices and empowers union members to direct their individual
30 career progress more effectively.

31 In relation to federal government policy, American unions actively sup-
32 ported the successful campaign of U.S. President Barack Obama. During
33 the presidential campaign, Obama talked about VET, supporting the forma-
34 tion of technical academies to prepare young people for careers in specific
35 occupations. The projected expansion in the number of ‘green jobs’ is also
36 expected to increase the demand for job training. This initiative will receive
37 federal funds through measures such as the Green Jobs Act of 2007, which
38 authorises grants to joint labour–management partnerships (White and
39 Walsh 2008). In 2009, President Obama proposed an ambitious American
40 Graduation Initiative to direct substantial federal government resources to
41 community colleges to increase the number of new graduates, renovate col-
42 lege facilities, and develop new courses of study, including online classes.

43 Looking more broadly, a recent federal government survey of private
44 industry establishments indicated that 56 per cent of unionised work-
45 ers had access to work-related education assistance (U.S. Department of
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Labor 2006). Since the early 1980s, the most prominent and well-financed innovations in the field have been the collectively bargained joint training programs in major industries, especially automobile manufacturing, telecommunications, steel production, rubber, aerospace, healthcare, and hospitality (hotel, restaurant, and gaming) firms. The impact of multi-employer programs is particularly evident in labour markets where unions have maintained significant influence. Examples include programs in New York City, where union-affiliated programs provide training and skill upgrading to more than two hundred thousand employees annually (Fischer 2003); San Francisco, California, where one-quarter of the unions offer occupational skill training for their members, investing a total of more than \$7.2 million yearly (Stange 2003); and Las Vegas, Nevada, where the Culinary Union operates an academy that trains new workforce entrants and provides occupational skill training and upgrading to existing workers.

These programs do not counterbalance, however, the impact of declining global economic conditions, federal government policies that have facilitated the shift of American jobs overseas, and management attitudes. Employment in manufacturing declined by 791,000 jobs in 2008, a trend that has affected workers in the automobile, telecommunications, and steel industries—the traditional centres of innovation in jointly governed, industry-wide workplace learning institutions. The revenues produced for these institutions through collective bargaining have fluctuated accordingly, affecting the number of persons served and the existence of local joint committees. Whereas the institutions considered often remain in place through harsh economic times, the scope of their activities vary according to industry conditions and whether firm management continues to favour joint programs or has reverted to managerial unilateralism (Thelen 2001).

UNIONS IN A PRECARIOUS LABOUR MARKET

The American vocational education and training (VET) system generally conforms to an individualistic, market-based model. As young people move through compulsory elementary and secondary public education (through the age of eighteen) educational pathways diverge. The children of middle-income and higher socio-economic status families typically enrol in four-year colleges, where they are expected to achieve baccalaureate or advanced degrees. Only 33 per cent obtain a degree within four years (Adelman 2006). Other young people move directly into the labour force, where they may receive on-the-job training from specific employers or attend one of 1,045 community colleges giving them access to occupational training, certificates recognised by industry groups, two-year associate degrees in specialised areas, and a conglomeration of other services (Hansen 1994). The community college system—highly decentralised and largely funded by state governments—is especially responsive to the workforce needs of local

1 employers and is a prime provider of remedial education. Union appren-
2 ticeship programs frequently have working partnerships with community
3 colleges, where theoretical instruction is offered. The direct federal role in
4 VET is small, although loans and grants provided by federal agencies influ-
5 ence the ability of many students to attend college (Hansen 1994). Overall,
6 non-federal VET, which includes some thirty-eight hundred private and
7 public two- and four-year institutions, is a complex environment with little
8 coordination or capacity to respond to national priorities. The federal gov-
9 ernment does not prescribe a role for trade unions in VET institutions.

10 Young workforce entrants receive minimal career guidance about
11 how to navigate the patchwork of organisations that provide career and
12 technical education. The fragmented, uncoordinated character of Ameri-
13 can VET means that many fail to receive the required skills and knowl-
14 edge about job opportunities that will enable them to obtain steady
15 work at family-sustaining wages. In response, the federal government
16 has established a series of workforce development programs that target
17 low-income persons, dislocated workers, youth, and other categories of
18 disadvantaged persons (Barnow and Nightingale 2007). These programs
19 are highly decentralised. Unions have a prescribed role in the most recent
20 of these programs via the Workforce Investment Act (WIA) of 1998.
21 This has created some sixteen hundred one-stop career centres that were
22 designed to consolidate employment and training services in a single
23 location in order to facilitate access by eligible participants. Centres are
24 governed by Workforce Investment Boards (WIBs). Board membership is
25 dominated, by statute, by business interests but they are also required to
26 include trade union representation. About eleven hundred union repre-
27 sentatives serve on these boards.

28 The American IR system is highly legalistic and conflictual. Although
29 workers have the legal right to organise collectively at the workplace,
30 opposition to unions among employers and business associations is vehe-
31 ment and often well organised. When unions do win an election and
32 successfully negotiate a contract, the terms can vary widely from one
33 employer to another. The decentralised nature of collective bargaining
34 and the breakdown of national industrial contract patterns does tend,
35 however, to foster innovation and a willingness to negotiate provisions
36 that respond to the production needs of particular shop-floor situations
37 (Thelen 2001).

38 The dynamics of restructuring since the later 1970s have meant that the
39 labour market has become a precarious one for many American workers.
40 Involuntary job loss and mass layoffs have become commonplace. Between
41 1979 and 2001, nearly fifty million non-agricultural jobs were lost, includ-
42 ing 7.45 million workers in trade-sensitive manufacturing firms (Kletzer
43 2005) and a growing proportion of white-collar, highly educated workers
44 in other sectors (Farber 2003). Workers now change occupations and indus-
45 tries more frequently than in the past, contributing to notable turbulence in
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the labour market and lower earnings for job changers (Baumol, Blinder, and Wolff 2003). 1
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 Among commentators, a consensus has emerged that the post–World 3
 War II institutional structure of relatively stable career paths, employment 4
 continuity in a single firm, perceptions of mutual obligations, and a pre- 5
 dictable psychological contract between workers and employers has eroded 6
 (Osterman 1999). In turn, there is widespread experimentation with new 7
 institutional forms (Osterman 2001) such as regional labour market inter- 8
 mediaries, which are more attuned to the values of individual responsibil- 9
 ity, limited expectations of employment security, career self-management, 10
 and a more market-based employment relationship (Cappelli 1999). 11
 This period of labour market change has coincided with a marked 12
 decline in trade union density and union power. Union membership as a 13
 proportion of all workers declined from 25.8 per cent in 1978 to 13.3 per 14
 cent in 2007, when the total number of union members stood at about 15
 15.7 million.¹ The drop was especially severe among private sector workers 16
 where unions lost more than 6.3 million members. Scholars attribute these 17
 changes to a combination of well-known structural factors (e.g. deindustri- 18
 alisation, deregulation, technological change, and increased international 19
 competition) along with intense (and often illegal) private sector employer 20
 opposition to union organising drives (Kleiner 2001). 21
 An issue of debate is the capacity of unions to organise new members 22
 and contribute directly to the productivity of unionised enterprises that 23
 have adopted aspects of high-performance work systems (Appelbaum 24
 2000). Since the mid-1980s, the AFL-CIO has recognised the need for 25
 unions to adjust to the changing environment by fostering union mergers, 26
 strengthening the ties between current union members and their unions, 27
 and developing new membership forms apart from collective bargain- 28
 ing relationships (Fiorito 2003). Particular attention has been directed 29
 toward creative strategies to organise new members through, for exam- 30
 ple, recruiting rank and file workers as networks of volunteers to meet 31
 one-on-one with prospective union members (Oppenheim 1991; Early 32
 1998) and operating ‘comprehensive campaigns’ that combine detailed 33
 corporate research with worker committees, rank and file mobilisation, 34
 and coordinated tactics that cultivate a self-reinforcing ‘culture of organ- 35
 ising’ (Bronfenbrenner 2003). 36
 In sectors such as healthcare and manufacturing, local unions and AFL- 37
 CIO central labour councils have forged coalitions with community-based 38
 organisations to conduct living wage campaigns, oppose trade policies, 39
 and mobilise students against low-wage sweatshops (Hurd, Milkman, and 40
 Turner 2003). The strategic focus of these efforts has been to implement 41
 ‘high-road partnerships’ in which multiple stakeholders coordinate their 42
 efforts to help ensure that economic development projects and industrial 43
 modernisation efforts produce the sort of ‘good jobs’ that benefit diverse 44
 segments of the community (AFL-CIO 2000). Although unions remain 45
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1 active in these coalitions, the coalitions are fragile and subject to funding
2 constraints and changes in political leadership.
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4 5 CATEGORIES OF UNION INVOLVED PROGRAMS 6

7 This section offers a typology of union-involved workplace learning pro-
8 grams as they have been introduced since the early 1970s and institutiona-
9 lised through collective bargaining and distinct organisational forms. The
10 categorisation is necessarily rough as the programs have been subjected to
11 limited critical analysis and raw data are often not available (Harris 2000).
12 What follows is based on secondary analysis and consultations within key
13 union staff involved in the programs.

14 Union-involved workplace learning has a long history, and support for edu-
15 cation stretches back to the earliest days of American trade unions. The early
16 craft unions contributed to the development of nascent apprenticeship systems
17 that set minimum time periods for apprentice training, wage levels, and edu-
18 cational requirements (Rorabaugh 1986). With the rise of mass production
19 and Taylorist work systems, a new wave of industrial, service, and public sec-
20 tor unions developed that participated in the construction of a new IR regime.
21 This system featured distinct spheres of influence for management and labour:
22 managers controlled strategic decision-making over investments, the planning
23 and implementation of technology, and the determination of what skills were
24 necessary to perform particular jobs; unions used the levers of collective bar-
25 gaining to negotiate over wage levels, procedural fairness, and a limited range
26 of issues oriented toward the economic interests of their members (Thomas
27 and Kochan 1992). Often termed ‘job control unionism’, unions ceded their
28 influence over the organisation of work and work-based skill formation,
29 focusing their education-related efforts instead on training union leaders
30 (Harris 2000). Unions also undertook political action to improve schools and
31 the quality of education for the population at large. Although these institu-
32 tional arrangements accorded a modicum of stability to labour–management
33 relations, they restricted the capacity of enterprises and public agencies to
34 effectively use advanced technology, enhance employee commitment, and
35 undertake transformation towards new organisational forms. As American
36 labour reassessed its position on new forms of work organisation, the AFL-
37 CIO (1994b, 15) called upon its affiliates ‘to embrace an expanded agenda
38 and to assume an expanded role as the representative of workers in a full
39 range of management decisions’. Direct sponsorship of workplace learning
40 programs, as in other countries, was framed as a way for unions to augment
41 the employment security of members, help members adjust to changing work-
42 place conditions and for unions themselves to reach out to new constituencies
43 (AFL-CIO 1999).

44 These programs serve diverse groups and multiple industries but share
45 historical roots along with union leadership of their formation and ongoing
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governance (Savoie and Cutcher-Gershenfeld 1991). These are non-traditional programs with multiple purposes. The programs are designed to serve individual workers according to their expressed needs, contribute to the competitive viability of firms, and contribute to the quality of public services (Ferman and Hoyman 1991).

Joint Apprenticeship Programs

The first category of union-involved program encompasses apprenticeship. The apprentice model of skill acquisition is distinctive because it integrates systematic on-the-job training, guided by an experienced master-level practitioner, with related classroom instruction. An estimated 490,000 apprentices were active in registered programs in 2003 (Glover and Bilginsoy 2005), an increase from 283,000 in 1990 (Bilginsoy 2003). Whereas the U.S. government has identified more than eight hundred occupations as apprenticeable, the majority of apprentices being trained in 2003 were as electricians, carpenters, pipe-fitters, and other construction trades workers. Here the admission of new apprentices varies according to local labour market conditions. Although some programs are sponsored by non-unionised employers, the majority (70 per cent) of registered apprentices participated in labour-management programs, governed by an infrastructure of local Joint Apprenticeship and Training Committees (JATC) and funded through collectively bargained contributions to local tax-exempt trust funds.

Although it is recognised that the apprenticeship system is small and specialised, government agencies, unions, and some firms have introduced innovations to maintain its relevance to changing workforce and industry needs. National joint training trust funds have been established to standardise curricula, encourage skill upgrading for incumbent workers, improve the skills of apprenticeship instructors, research industry trends, and launch apprenticeship programs for emerging occupations. Dual enrolment systems have been created to enable apprentices to earn college credits and progress toward higher degrees (Israel 1981), fostering career advancement and helping to attract more highly qualified applicants to selected fields.

Union-Controlled Programs

In a second type of union-involved workplace learning program, most prevalent in the public sector, union trustees and staff directly control the allocation of resources placed in collectively bargained trusts or non-profit organisations. This autonomy of governance was achieved first in New York City, where District Council (DC) 37 of the State, County and Municipal Employees (AFSCME) union established an intra-union Education Department and then negotiated a trust fund in 1971 that gave union members access to an array of services, notably basic skills education geared toward allowing union members to obtain the credentials for career advancement

1 in city hospitals (Gray et al. 1991). The DC 37 program incorporates a
2 worker-centred learning approach with services tailored to the individual
3 needs of members, classes held at convenient times and locations, a peer
4 counselling network to assist participants, and training materials drawn
5 from actual workplace documents. Policy analysts (Fischer 2003) report
6 that DC 37's annual budget of more than \$3 million served ten to twelve
7 thousand persons in 2003. AFSCME regards such programs as part of a
8 strategy of full participation in the implementation of new work systems,
9 giving unions and workers a 'new responsibility: day-to-day involvement in
10 decisions affecting the organization of work' (AFSCME 1995, 39).

11 Innovations in the reorganisation of public services moved centre stage
12 during the 1990s. Among State of Ohio employees represented by an
13 AFSCME affiliate, systematic training in process-improvement techniques
14 was a key ingredient of a quality-improvement program that has generated
15 \$100 million in cost savings. A union-governed Education Trust in Ohio
16 is offering programs to enable members to 'advance their careers, improve
17 the quality of work life and work towards achieving employment security',²
18 purposes that resonate with the demands of a precarious labour market.
19 In Illinois, the Upward Mobility Program negotiated by AFSCME Council
20 31 has provided career advancement and counselling services to more than
21 thirteen hundred union members (Barrett and Greene 2006).

22 In the area around Los Angeles, California, an affiliate of the Service
23 Employees International Union (SEIU) represents more than 130,000 home
24 healthcare and nursing home workers and has established a Homecare
25 Workers Training Center to offer training leading to portable credentials
26 in expanding occupations, job readiness skills, and career advancement
27 resources. The union sees the training centre as an integral part of its efforts
28 'to build power for ourselves', promoting the 'highest quality long term care'
29 while expanding the 'role of workers in workplace decision-making'.³

31 **Jointly Governed Programs**

32 The third type of program identified here reflects a shift in the traditional
33 policies of major industrial and service unions, as developed in a number of
34 key industries over the past twenty-five years. These institutional arrange-
35 ments influence how actors in individual work environments adjust to issues
36 such as firm competitiveness, the costs and efficient delivery of healthcare
37 services, and working conditions in service sector firms that have experi-
38 enced rapid employment growth. Different, jointly governed structures
39 have evolved in each of these cases. Collective bargaining provisions spec-
40 ify that a certain contribution (based on hours worked) be set aside for
41 education and training purposes. The entities created from these contribu-
42 tions have the capacity to layer one constellation of services (e.g. helping
43 redundant employees or offering basic skills education) onto another (e.g.
44 skill upgrading for incumbent workers or real-time on-the-job training),
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thus representing a *multivalent resource* with the potential to assert union/worker influence directly into the social construction of work systems. 1
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Programs involving the United Auto Workers (UAW) union and domestic manufacturers are one example of these kinds of programs and have facilitated work reorganisation in auto factories through locally driven service delivery structures. The well known UAW-Ford Employee Development and Training Program, for example, was regarded as a ‘significant innovation’ (Kassalow 1987, 116) that would encourage less adversarial labour–management relations, serve the career planning and educational needs of workers, and provide a framework to deliver reemployment assistance to redundant employees (Tomasko and Dickinson 1991). As competitive pressures on automakers intensified and U.S. firms became more committed to post-Taylorist work reorganisation, the program evolved to include direct union–worker intervention in new product design and selection of computer numerical control machinery. The program also involved building on-site learning centres and launching initiatives such as the Technical Skills Program to enable workers to use new technologies on the shop floor. In Cleveland, Ohio, a Simultaneous Engineering Team enabled workers to modify equipment before installation and save jobs by keeping machining tasks in-house that would have been outsourced.⁴ Services cover new hires (who receive peer-to-peer orientations from experienced workers) to long-time employees (who, for example, attended in-plant classes to receive a master’s degree in Human Resource Management). The impact, according to UAW and Ford officials, was to drive a decisive change in traditional auto plant culture, giving ‘hourly people power, responsibility and credibility’ in a Ford Production System model that integrates high performance work techniques, enhanced communication, quality production and continuous improvement (UAW-Ford 1998). 3
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The union has pursued its strategy of bolstering employment security through institutionalised training and education programs for members. The UAW-GM Human Resource Center, jointly governed and funded with per hour contributions into a national fund, offered a panoply of services, including an offer of more than eighty-six hundred distinct training opportunities to members (James 1996). 29
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In the telecommunications industry, the Communication Workers Union (CWU) and International Brotherhood of Electrical Workers (IBEW) union have jointly governed the Alliance for Employee Growth and Development since its formation in 1986. The alliance has evolved from serving the diverse employability needs of those affected by the breakup of the old Bell Telephone System (Alexander 1989) into a multifaceted national network of local committees that activate the ‘promise of lifelong learning’ for union members through career assessment, occupational training in emerging technologies, and partnerships with firms and colleges to offer skill upgrading through distance learning classes. Alliance officials report serving 173,000 individuals over twenty years. 35
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1 In the steel industry, the steelworkers union, United Steel Workers
2 (USW), and manufacturers have created the Institute for Career Develop-
3 ment (ICD), whose guiding principles specify that ‘workers must play a
4 significant role in the design and development of their jobs, their training
5 and education and their working environment’, a mandate that links edu-
6 cation and training initiatives directly to factory-level work reorganisation
7 (ISG and USWA 2002, 95). Founded by the USW and steel companies in
8 1989, and expanded to include three major rubber industry firms, the ICD
9 operates through a network of some seventy-two local joint committees.
10 As part of their national bargaining policy, the USW identifies an increased
11 union role in workplace training and building on the success of the ICD as
12 ‘key strategic objectives’.⁵

13 The fluctuation in demand for airliners, along with employment instabil-
14 ity and outsourcing, has made work reorganisation and skill training very
15 challenging endeavours for the Boeing Company. Boeing’s major facilities are
16 organised by the International Association of Machinists (IAM), and after
17 studying other programs, leaders formed the IAM/Boeing Quality Through
18 Training Program (QTTP) in 1989 to ‘offer a diverse range of opportunities for
19 training, retraining and personal growth to enhance employee development’;
20 improve the company’s economic performance; and support activities related
21 to job combinations, work reorganisation, and technological change (Kochan
22 2001). The QTTP carries out a sophisticated range of career advising, skill
23 training, peer-to-peer instruction, and classroom education activities in mul-
24 tiple sites in three states. In one notable innovation, experienced employees
25 circulate through production facilities providing real-time instruction to pro-
26 duction workers as they engage in their work; about nine hundred persons
27 received such ‘one-on-one OJT’ during 2004 (IAM/Boeing 2005).

28 The enduring value of these sectoral, jointly governed workplace learning
29 bodies is suggested by the spread of this model to other industries, notably
30 those white-collar and service worksites that employ a high proportion of
31 women and are characterised by the blurring of employee–employer roles. In
32 highly urbanised healthcare labour markets, for example, long-standing joint
33 programs provide basic skills education, occupational training, skill upgrad-
34 ing, and reemployment services to unionised hospital workers in the New
35 York City region and Philadelphia. Case studies indicate that these programs
36 have incorporated labour–management committees to ‘improve operations,
37 patient care and employee job satisfaction’. The programs identify employ-
38 ment and work trends in the healthcare industry and have made the provision
39 of training-related services a strategic issue for the unions involved (AFL-CIO
40 2000, 30, 32).

41 An expanded role in workplace decision-making for workers is linked to
42 the education and training components of the national agreements negotiated
43 between Kaiser Permanente (KP)—the nation’s largest health maintenance
44 organisation—and the Coalition of Kaiser Permanente Unions (CKPU). After
45 crafting a labour–management partnership in 1997 to pursue mutual goals
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and foster worker involvement, the two sides launched an unprecedented coordinated bargaining process in which more than four hundred unionists and managers divided into issue-centred working groups to identify priority problems and formulate alternative solutions (McKersie, Eaton, and Kochan 2004). Two groups covered the topics of ‘performance and workforce development’ and ‘work organisation and innovation’. The resulting 2000 National Agreement declared workforce development to be a ‘key pillar’ supporting ‘organisational transformation’ into a high-performance organisation in which self-directed work teams would modify work practices, deliver patient care, and jointly plan staffing levels (a task formerly reserved for managers).

After reaffirming their joint commitment to union involvement in ‘strategic decision-making’ and the participation of frontline employees in the redesign of work processes (Kaiser & Union Coalition 2003, 7, 15), the parties entered another round of negotiations, agreeing to enhance the emphasis on worker training and workforce planning. The second agreement again asserted the centrality of a jointly managed system of workforce development ‘to create a culture that values and invests in lifelong learning and enhanced career opportunities’ (Kaiser & Union Coalition 2005, 19). The joint system is being designed to integrate analysis of workforce planning data, career development services, tuition reimbursement, skill upgrading training, employee retention activities, and the training of union stewards for effective participation in the enterprise partnership.

In the hospitality industry, where women workers, ethnic minorities, and recent immigrants comprise a large segment of the workforce, the dominant U.S. union has increasingly incorporated education and training provision into their contracts to help members learn basic English-language skills, advance in their careers, and upgrade their skills. A leading example of innovative bargaining is evident in San Francisco, where Local 2 of the Hotel and Restaurant (UNITE HERE) union joined with a multi-employer group of hotels in 1994 to study the problems besetting local establishments and negotiate a ‘living contract’ that formed ongoing problem-solving teams in hotels (Korshak 2000). The 1995 collective bargaining agreement established a jointly governed education and training fund that has been renewed in subsequent contracts, providing union members with adequate cross-training to foster a reduction in job classifications, greater efficiency, service quality, and improved communication. Through the agency of this fund and grants from government programs, union members have access to English as a Second Language (ESL) classes, remedial training, and certification in ‘Culinary and Service Skills’ from a local college (Meléndez 2004).

Regional Social Partnerships

The fourth category encompasses union involvement in education and training efforts initiated by social partnerships. Boguslaw (2002) characterises these partnerships as coalitions of organisations that integrate economic

1 and workforce development functions across sectors in a regional labour
2 market to benefit the public interest. Whereas jointly governed programs
3 are relatively self-sufficient and well established (and codified in collective
4 bargaining), assembling the members of a social partnership requires care-
5 ful selection and negotiation with multiple community stakeholders. The
6 success of partnerships is thus often related to the expertise of a politically
7 sophisticated leadership as social partnerships are more tenuous and contin-
8 gent upon external funding sources. Partnerships entail active involvement
9 by the state to facilitate a process of ‘mandated cooperation’ among organi-
10 sations. Such social partnerships represent a new paradigm for workforce
11 and economic development, Boguslaw (2002, 23) argues, in which the state
12 provides incentives for firms, unions, and community organisations to over-
13 come individualistic strategies and initiate collective action that serves pub-
14 lic purposes, for example, retaining jobs in a declining industry. This model
15 of partnership includes what has been termed ‘high-road partnerships’ in
16 which unions are involved in community-wide campaigns to ‘boost their
17 regional economies’ and ‘help create good jobs and the skills needed for
18 those jobs’ (AFL-CIO 2000, 5) by integrating industrial modernisation and
19 workforce development with broad-based coalition building.

20 We can identify good examples of partnerships organised by not-for-
21 profit organisations in Wisconsin, New York City, and California. In
22 concert with the University of Wisconsin and local government officials,
23 state AFL-CIO leaders and corporate executives established the Wisconsin
24 Regional Training Partnership (WRTP) in 1992 to aid manufacturing firms
25 in the Milwaukee metropolitan area by assessing industry needs, upgrad-
26 ing the skills of incumbent workers, coordinating educational resources,
27 and helping to implement high-performance work systems (Bernhardt,
28 Dresser, and Rogers 2001). With unions playing a central role using fund-
29 ing from government and foundation grants, the WRTP has grown into an
30 organisation of around 150 employer members who invest more than \$20
31 million annually in training their workers. These actions have increased
32 productivity in individual firms and enhanced employment security among
33 workers (Burruss 2006). As a prototype of a union-involved workforce
34 intermediary, the WRTP has become a multivalent resource that has served
35 dislocated workers, developed standardised classes in ‘essential skills’ for
36 several industries, and enhanced the voice of unions in public policy deci-
37 sions regarding economic development. In response to overall community
38 needs, the WRTP has expanded into the area’s healthcare, construction,
39 and hospitality industries.

40 The capacity of union-initiated social partnerships to consolidate
41 resources to benefit business owners, workers, and the public interest was
42 demonstrated in New York City after the terrorist attacks of 11 September
43 2001. These attacks cost an estimated 105,000 jobs and \$21 billion in lost
44 annual output to the local economy (Fiscal Policy Institute 2001). In place
45 since 1985 with forty-six member unions, the Consortium for Worker
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Education (CWE) has an infrastructure of seven workers centres, relationships with education and training providers, and regular government and foundation grants that enabled it to provide basic skills education, training for in-demand occupations, skill upgrading, outplacement services for professional employees, and career counselling for 110,000 persons per year (Fischer 2003). The CWE drew upon its network and political support to obtain \$32 million in emergency funding from U.S. Congress to initiate programs that counselled unemployed workers, found alternative employment opportunities, and provided wage subsidies for more than 190 small businesses that helped them survive the economic downturn. More than sixty-four hundred persons received education and training services over three years (CWE 2005).

The potential for a labour-initiated social partnership to garner political power and influence economic development policy, and then spill over to other localities, is highlighted by Working Partnerships USA (WPUSA), a non-profit organisation formed in 1995 by the South Bay AFL-CIO Labor Council. Representing a broad coalition of religious, environmental, and community-based organisations in the region surrounding San Jose, adjoining the heart of California's Silicon Valley, WPUSA issued a series of research reports that spotlighted growing income inequality in the area and offered solutions in the form of public campaigns to limit corporate tax subsidies, boost the incomes of low-wage workers, and provide health insurance to children (Byrd and Rhee 2004). Through its Labor-Community Leadership Institute, WPUSA educates members of the coalition about the political economy of the area and the effect of political institutions on the direction of economic development (Benner 2002). Inspired by WPUSA accomplishments, the Partnership for Working Families has established a network of seventeen organisations in California and nine other states that are spearheading campaigns to ensure that publicly financed redevelopment projects hire local residents, provide adequate education and training opportunities for them, and meet the needs of low-income neighbourhoods (Partnership for Working Families 2006).

Proto-Union Occupational Associations

The final category of program comprises associations of employees in related occupations who have gathered together to assert their rights, strive for improved working conditions, and advocate public policies that recognise their interests. These are characterised as *proto-union formations* because they follow aspects of the 'mutual aid logic' of unions (Van Jaarsveld 2004). These associations are incorporated organisations but do not have the legal standing to engage in collective bargaining. Unions may affiliate with such organisations or spearhead their formation to avoid legal constraints on the scope of allowable activities. These proto-union formations provide access to education and training for their members via a menu

1 of services intended to develop a sense of community and collective identity
2 among workers.

3 The leading example is WashTech/CWA, an association of computer
4 professionals who work as contractors for the Microsoft Corporation and
5 came together in 1998 to strive for greater job security and access to stock
6 options and to provide an ‘institutional voice’ (Truzzi 2007) for the com-
7 pany’s temporary workers. After affiliating with the CWA, the organisa-
8 tion produced reports on the employment status of information technology
9 workers, won a \$97 million settlement on behalf of Microsoft ‘permatemps’,
10 and has testified in legislative bodies to limit the offshoring of software
11 development projects. WashTech/CWA opened a training centre for com-
12 puter professionals in 2001 and offers other educational opportunities for
13 members in concert with colleges in the Seattle area (Van Jaarsveld 2004)
14 and online through the CWA National Education and Training Trust.

15 In New York City, HERE Local 100 founded the Restaurant Opportuni-
16 ties Center (ROC), a multi-employer membership organisation and worker
17 centre that was initiated to help workers displaced from the 2001 terrorist
18 attacks.⁶ It has exposed unhealthy and poorly paid working conditions in
19 local restaurants, run public campaigns against worker exploitation in par-
20 ticular establishments, and won back pay for groups of employees. Nearly
21 two-thirds of New York’s restaurant workers were born outside the U.S.
22 (Kharbanda and Ritchie 2005). An important component of the ‘privileges’
23 ROC offers to its members is free access to ESL classes, courses on bartend-
24 ing and cooking, placement assistance, legal advice, and other workforce
25 development services to foster career advancement.⁷

26 27 28 INNOVATIONS FOR ORGANISING AND UNION RENEWAL

29
30 Viewed as a power resource, many of these initiatives are linked to efforts
31 to organise additional workers into unions. In California, for example, the
32 Pipe Trades Council uses apprenticeship programs and a network of tech-
33 nologically sophisticated training centres (Benner 2002) to bring thirty-five
34 hundred new members per year into their union locals and gain a foothold
35 in emerging industries such as biotechnology. The partnership between KP
36 and the CKPU was developed through agreements in which the company
37 pledged to remain neutral during unionising campaigns. This understand-
38 ing led to concerted efforts to organise relevant Kaiser workers by CKPU
39 members across the country.

40 In recent years, American unions have sought to organise new work-
41 places by convincing a majority of workers to sign a card indicating their
42 willingness to join the union; the union then approaches the employer to
43 voluntarily recognise it as a sole bargaining agent. In Las Vegas, where
44 casinos have relied upon the Hotel and Restaurant (UNITE HERE) union
45 for skilled workers, labour–management training trusts have gone hand
46

in hand with employer neutrality agreements and card check recognition, measures that have fuelled successful organising campaigns (Benz 2004). The establishment of durable social partnerships, and union engagement in coalitions with community-based organisations in localities, cultivates an environment in which employers in industries sensitive to preferential consumer choice (such as hotels, restaurants, and casinos) and governmental regulation (such as hospitals and communication firms) will exercise their 'business judgement' in a manner that accepts neutrality agreements and card check recognition, actions that increase the likelihood that union organising campaigns will prevail (Brudney 2004, 840).

The success of union organising campaigns incorporating the increased commitment of unions to the institutionalisation of workplace learning systems may make union membership more appealing to two critical groups: young workers and immigrants in low-wage jobs. As an accelerating number of baby boomers reach retirement age, the active workforce will become populated by the young workers of what Howe and Strauss (2000) call the Millennial Generation. This demographic cohort, consisting of the approximately ninety-five million persons born between 1978 and 2000 (Leyden and Teixeira 2007), predominates on college campuses (Lowery 2001) and is streaming into the labour force. The 'millennials' tend to prefer an 'inclusive style of management' (Eisner 2005, 6), expect to be doing challenging (not menial) work, and place a high value on teamwork and respect from co-workers, all inclinations compatible with the prevalence of high-performance work systems. Moreover, they are realistic about the lack of job security, have little loyalty to a single employer, and value the opportunity to learn and grow on the job, all traits that align with labour-management partnerships that provide resources for continuous learning. Coming to the workplace with high expectations (Tyler 2007) for a meaningful quality of work life, the millennials—if disappointed—could turn to unions to increase their voice on the job. The sort of new union initiatives described in this chapter could appeal to this generation. A 2006 survey by Pew Research Center found that 44 per cent of millennials agree that the decline in unionisation has hurt American workers. In 2007, among black and white millennials, about 74 per cent agreed that 'labor unions are necessary to protect the working person' (Logan and Madland 2008:10).

The ongoing commitment of union-involved workplace learning programs to provide ESL training, and relate that training directly to workplace and career advancement, also reflects union responsiveness to the needs of immigrant workers, especially those working in low-wage employment situations. The Migration Policy Institute reports that foreign born persons in the civilian labour force increased by 76 per cent, to 20.3 million, between 1990 and 2002.⁸ In order to enhance their economic prospects many non-English speakers are interested in upgrading their language skills. Research has shown that such upgrading contributes to higher earnings and more stable employment (Burt 2004). Few employers provide such

1 instruction on-site, however, and the exhausting schedules of low-wage
2 service workers often preclude attending ESL classes at public institutions.
3 Historically, unions and workplace learning programs have helped to fill
4 the gap, providing worker-centred basic skills and ESL instruction delivered
5 at the workplace and oriented toward the career advancement of their
6 members (AFL-CIO 1999).

7 In the context of increased union resources being devoted to organising,
8 providing ESL instruction serves multiple purposes. First, it enables union
9 advocates to reach out directly to non-native speakers, as the hotel and restaurant
10 union has done in concert with ROC-NY. It also demonstrates to
11 prospective members, in tangible and immediately relevant terms, the sort of
12 life-improving services they can expect to gain from union enrolment. Finally,
13 once immigrants become union members, as numerous union-sponsored programs
14 have shown, basic skills and ESL instruction may be directly related
15 to advancement on the job, gaining increased respect from co-workers, and
16 becoming a more valuable employee in the eyes of managers. Such training and
17 other employment-related services provided by unions may thus be expected
18 to contribute to an improving trend in union organising: between 1996 and
19 2003, the number of immigrants covered by union contracts increased by 23
20 per cent, to two million.⁹ Given the receptivity of young Hispanics towards
21 unions—91 per cent of Hispanic millennials agreed in 2007 that unions are
22 necessary for worker protection (Logan and Madland 2008)—their enrolment
23 in unions may be expected to continue.

24 In summary, the transformation of labour market relations due to corporate
25 investment practices, the rise of high-performance work systems, and forces related
26 to globalisation has presented a historic challenge to U.S. trade unions. Unions
27 have responded in a strategic manner, modifying their approaches to organising
28 additional members, changing their institutional structures, and implementing a
29 host of innovations that indicate their willingness to intervene in both the design
30 of work practices in individual workplaces and the wealth-creation (workforce and
31 economic development) dynamics of local and regional economies. The move of
32 American trade unionism toward strategic intervention, continuous coalition-
33 building, and aggressive organising is reflected in union involvement in the
34 construction of workplace learning institutions. Some of this activity builds upon
35 existing structures, such as long-standing joint apprenticeship programs and
36 public employee union commitment to membership education. Other activities
37 involve the formation of new labour–management partnerships in industries that
38 have been severely impacted by foreign competition and rapid employment growth
39 in the service sector. Through the formation of social partnerships in alliance
40 with community-based organisations, and experimentation with associations based
41 upon occupational allegiance, unions are seeking to limit the economic damage
42 associated with global restructuring and they are seeking to shape public policy,
43 creating an environment more receptive to the sorts of changes in U.S.
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labour law—namely, the movement toward greater reliance on employer neutrality agreements and card check recognition—that set the stage for a resurgence in union organising. In turn, the institutionalisation of union-involved workplace learning systems stands to make union membership more attractive to groups such as young workers, recent immigrants, and low-wage workers in the service sector.

NOTES

1. Unless otherwise noted, all figures for union membership are derived from the online database compiled by Hirsch and Macpherson (2007).
2. The Ohio Civil Service Employees Association bargained for control of the trust in 2006. The quote is from ‘About the Union Education Trust’. Available at <http://www.uedtrust.org/gd/templates/pages/WD/Main.aspx?page=15> (accessed 20 June 2007).
3. The union referenced here is SEIU Local 434B. Quotes are from ‘Homecare Workers Training Center’. Available at <http://www.homecareworkers.org/> (accessed 29 June 2007).
4. Information on specific UAW-Ford EDTP and related joint activities is derived from descriptive case studies in the organisation’s periodic newsletter, 1995–2006, copies of which are online. See ‘Sharing Our Pride’. Available at http://www.uawford.com/pride_frameset.html (accessed 22 June 2007).
5. See ‘Building Power at the Bargaining Table’. Available at http://www.usw.org/usw/program/adminlinks/docs//BP_Bargaining_Table.pdf (accessed 19 July 2007).
6. In her insightful book on worker centres across the U.S., Janice Fine (2006, 247) speculates that ROC-NY and several other industry-wide organisations are functioning as pre-union formations that may set the stage for more systematic union organising drives. Of the thirty-nine centres studied in this research, 50 per cent offered ESL classes to participants and many had worked with unions in coalition efforts.
7. See ‘Restaurant Opportunities Center of New York’. Available at <http://www.rocny.org/index.htm> (accessed 17 July 2007). ROC-NY holds regular meeting for restaurant workers to share information about job openings and learn more about their rights on the job.
8. See ‘The Foreign Born in the U.S. Labor Force: Numbers and Trends. January 2004’. Available at http://www.migrationpolicy.org/pubs/US_Immigration_Resources.php (accessed 24 July 2007).
9. See ‘Immigrant Union Members: Numbers and Trends. May 2004’. Available at http://www.migrationpolicy.org/pubs/US_Immigration_Resources.php (accessed 24 July 2007). The number of native persons with union representation declined by 7 per cent during the same period.

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