

Long-Range Planning in North American Unions : Preliminary Findings

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Résumé de l'article

Depuis le début des années 1980, on a beaucoup discuté de la lutte menée par les dirigeants syndicaux nord-américains pour survivre malgré les nombreux défis posés par la situation économique. Tandis que plusieurs entreprises essaient de redevenir compétitives en recourant à de nouvelles pratiques de gestion, telles la gestion de la qualité et la responsabilisation du personnel, il y a peu de données empiriques sur de nouvelles approches conçues pour rendre sa vitalité au mouvement syndical. Cet article présente des données empiriques sur un moyen possible pour aider les syndicats à venir à bout de la turbulence qui les entoure : la planification de longue durée.

Cinq cents questionnaires furent postés à tous les présidents de syndicats nationaux et internationaux en Amérique du Nord. Deux cent neuf réponses ont pu être utilisées et parmi celles-ci, 51 répondants (24,4 %) ont déclaré faire de la planification de longue durée, c'est-à-dire avoir un plan écrit qui s'échelonne sur deux ans et plus. La première section du questionnaire portait sur des informations générales et des données démographiques. Elle cherchait ensuite à préciser si une planification pour deux ans et plus existait au sein du syndicat, qui en était responsable, si des consultants externes avaient été utilisés et le pourcentage de propositions mises en application depuis 1985.

La deuxième section du questionnaire incluait une liste d'éléments de planification possibles et la troisième contenait des questions visant à mesurer la perception des répondants au sujet de l'efficacité de leur planification et leur attitude à l'égard de ce processus de décision.

L'analyse des données révèle que les trois éléments les plus souvent prévus dans la planification des syndicats sont l'éducation syndicale, les aspects budgétaires et l'action politique. En ce qui concerne la perception de l'efficacité à s'engager dans une telle planification à long terme, les ressources financières, le temps et l'expertise du personnel sont les éléments les plus importants. De plus, le plan doit être perçu comme étant important pour être efficace.

En termes de mise en œuvre de la planification, ici encore les ressources matérielles et humaines sont fondamentales ainsi que le support et l'implication du président du syndicat. Les consultants, cependant, sont perçus comme étant un facteur négatif.

Finalement, les syndicats qui représentent un pourcentage élevé de travailleurs à temps partiel et ceux que l'on retrouve principalement dans le secteur manufacturier et celui des services privés sont plus sujets à avoir exécuté une plus grande partie de leur plan.

Long-Range Planning in North American Unions Preliminary Findings

**Yonatan Reshef
and
Kay Stratton-Devine**

The content of union planning, as well as union leader perceptions of the effectiveness and extent of implementation of their plans are explored in this research. Data were gathered from a survey of all national and international unions in North America. Results indicate that 24.4 per cent of the respondent unions engage in long-range planning, with education, budgeting and political action being the most frequently cited topics.

Since the early 1980s, the struggle of North American union leaders to survive a host of environmental challenges has been the subject of numerous discussions (e.g., Garbarino 1984; Kochan and Piore 1984; Lawler 1990; Lawler and Mohrman 1987). Changes in workforce demographics, a growing use of computer-based technologies, several recessions, deregulation, privatization, and increasing domestic and international competition have created a highly unstable environment for most union and business organizations. For many labour unions, however, an era of unfavorable legislation and management anti-union activities have magnified the organizational pressures. Whereas many business organizations are trying to regain competitiveness by adopting new managerial practices and philosophies that emphasize such concepts as quality management and employee empowerment, there is little evidence of systematic union practices designed to revitalize the labour movement. It is unknown, however, whether this dearth of information is due to a lack of interest on the part of researchers, or a lack of union action. This article

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explores current uses of one of the possible means by which unions might cope with the turbulence surrounding them — long-range planning.

RESEARCH BACKGROUND

Over 20 years ago, Bok and Dunlop (1970: 186) stated that, “[j]udged by contemporary standards of administration, the typical international union leaves much to be desired,” for unions had done little in terms of research, planning, budgeting or resource allocation. Since then, both the conceptual literature and empirical research on union administration and, more specifically, on union planning have been sparse and suffers from a lack of a unifying conceptual framework. The available body of research is embedded in two intellectual foci — external and internal. Externally, analyzing the extent and effectiveness of American union strategic planning, Stratton and Brown (1988) concluded that only 35 percent of the respondents to their survey engaged in strategic planning, and that active planners were more aggressive in organizing, utilized innovative tactics (e.g., corporate campaigns), and experienced a greater membership growth rate than non-planners. Scheck and Bohlander (1990), on the other hand, reported that 57 percent of the participants in their survey (leaders of U.S. national labour organizations) set objectives for long-term action. Neither study, however, clarified the meaning of the core concepts or provided any information on why some unions plan while others do not.

Internally, Murray (1990), in Canada, and Clark and Gray (1992), in the United States, noted that some unions are making structural and strategic adjustments to improve their administration. Yet, Lowe (1990) found that the employees of a major Canadian union felt that profound administrative changes were needed in terms of more staff, work reorganization and planning, as well as better defined staff responsibilities and union goals if work-related stress were to be alleviated.

These inconsistencies might be attributable to a twofold weakness. First, union planning research is grounded in the corporate literature, when it might be more appropriate to draw upon experiences from nonprofit or public sector organizations (e.g. Bryson 1988a, 1988b; Jenster and Overstreet 1990; Ring and Perry 1985; White 1991). Contextual similarities seem more prevalent between unions and these organizations than between unions and profit-oriented corporations. Unions, nonprofit and public organizations are required to work within a mandate that is well defined, for example, through a constitution, and are accountable to a wide range of stakeholders. Like elected officials in the public sector, union leaders must heed their constituents’ concerns or else risk their political future. Further, the need to communicate effectively and quickly with a large number of heterogeneous interest groups may create

consensus problems, while clearly articulated plans may serve as rallying points for mobilizing opposition. Moreover, leaders' political executive tenure is limited, their agendas change constantly, and the coalitions with which they work are typically unstable. All of these factors may militate against a detailed strategic plan that spans five years or more and invite a more flexible planning process that is geared toward a shorter time range.

The second weakness of the research on union planning stems from the definitional and operational treatment of the concept "planning" and of its variants. This term is troublesome given that there is no widely accepted definition in the union, corporate, government (public sector), or nonprofit organization literature. The concept of planning has been associated with variable terminology, including the use of adjectival prefixes such as short-term, long-term, comprehensive, integrated, operational, formal, implicit, emergent, and strategic. Given the broad range of definitional possibilities, all organizations engage in "planning" of some nature. Consequently, inconsistencies in research findings may be the result of the differential and idiosyncratic use of terminology and definitions.

The use of the prefix "strategic" vividly illustrates the problem. According to Lawler (1990), the definition of strategy that is useful in understanding the employers' and unions' actions is that advanced by Mason and Mitroff (1983), who state that strategy is related to plans for acquiring power. Stratton and Brown (1988), Scheck and Bohlander (1990), and Dunlop (1990) used such definitions as Andrews's (1987), which refers to the production of policies and plans and the range of businesses a company is to pursue, but has no immediate relevance for unions. Still, Kochan, McKersie and Cappelli's (1984) concept of strategic choice advanced two conditions: 1) that strategic decisions occur only when parties have discretion over decisions; and 2) strategic decisions are those that alter the party's role or its relationship with other actors in the industrial relations system.

To overcome the pitfalls associated with the idiosyncratic nature of the term strategic planning (Rumelt 1988), the more conservative and generic (Steiner 1963) term "long-range planning" is used here. Until the concept of strategic planning is adequately defined in a union context, conservatism seems the best approach to follow. The operational definition used in this research encompassed any national or international union which conducted planning which was: 1) done in advance of taking action (two years, in this case); 2) a system of written decisions; and 3) a process directed toward producing one or more future states which are desired and which are not expected to occur unless something is done (Ackoff 1970). Given the operational definition used, long-range planning, rather than the more popular use of strategic planning, is the appropriate moniker for our research. Note that in terms of

practice, planning two years into the future is long-term for unions, given the incremental nature of most of their activities.

RESEARCH FOCUS

The primary goal of this research was to conduct an exploratory investigation of union long-range planning. As such, organizations which had formal, written plans extending two or more years into the future were classified as long-range planners and were the target of the research. The content of union plans, as well as plan effectiveness and the extent of plan implementation, were analyzed using union officer perceptions of the availability and importance of resources, national leader support, and the effect of external consultants.

The content of union plans is of interest because it defines what union officers and staff believe are the most pressing issues. Further, the issues that unions confront are likely to be quite different from those which other types of organizations might address. Unfortunately, no existing literature was available to draw upon or to build upon in designing the content-related segments of the study. Interviews with union officers and staff were analyzed, however, to determine which issues might be most salient to include in the study.¹

Planning effectiveness is also important, as it presents an unexplored, and therefore, unresolved question. Further, most union officers are interested in whether or not planning improves the functioning of a union. For this project, effectiveness was defined as the perceived ability of the union to sustain growth and to improve its performance over time, which are two current concerns of union leaders. Perceptions were gathered rather than hard data, as it was believed the unions' decision-makers best know the nature of their environment (Hall 1987), and any unique circumstances might not be captured through the use of numbers, or hard data.

Finally, plan implementation, or the percent of a union's plans which have been implemented since 1985, should indicate how seriously union officials view their long-term plans. If plans are not implemented, then it is likely that long-term planning and its subsequent results are not perceived as high priority items.

¹ Interviews were conducted with 22 union officers or staff, from 15 different union organizations in Canada and the U.S. More specifically, six local level, five regional, six national, two international, and three umbrella level personnel were contacted. Of the 15 organizations, 12 were based in Canada and three in the U.S. The sample selected for interviews was deliberately diverse, representing unions in different sectors of the economy, both centralized and decentralized, and of different sizes. A list of the participating unions is available upon request.

In terms of plan effectiveness and implementation, the body of knowledge on these issues revolves primarily around business, nonprofit, and public sector organizations, not unions. Various insights were gained from past research on these organizations, however. For example, whether or not the use of formal planning is effective in terms of enhancing organizational performance is still an unresolved question in the business literature (e.g., Ansoff *et al.* 1970; Bracker and Pearson 1986; Herold 1972; Thune and House 1970; Grinyer and Norburn 1975; Kallman and Shapiro 1978; Kudla 1980; Pearce, Robbins and Robinson 1987). One reason for the inconclusiveness of the planning research may be that many of the studies did not control for the availability and quality of organizational resources. Instead, process (Huff and Reger 1987) or content (Fahey and Christensen 1986) issues were the foci.

The outcomes, or effectiveness of planning by public and nonprofit organizations seem to be mainly documented through case studies (e.g. Bryson 1988b), or through a mixture of retrospective case histories, such as those conducted through the Bradford studies (Hickson *et al.* 1986). Overall, much of the public and nonprofit organization literature describes elements that lead to successful processes and/or outcomes.

We believe that for planning within unions, as well as in other types of organizations to be effective, the availability of various material and human resources is vital. For instance, any organization wishing to successfully engage in planning must possess resources such as financial assets, knowledge and expertise, and staff personnel, in addition to astute, entrepreneurial leadership (Stratton and Reshef 1990). As such, this research proposes that to predict perceived planning effectiveness and the extent of plan implementation, assorted organizational resources must be included in the analysis.

METHODOLOGY

Sample and Method

Five hundred survey questionnaires were mailed to all national and international labor union presidents in North America, as obtained from the *Directory of Labour Organizations in Canada* (Bureau of Labour Information 1989) and the U.S. *Union Sourcebook* (Troy and Sheflin 1985). Two hundred and nine usable responses were returned, yielding a response rate of 44.7 per cent. Of these, 115 (54.9%) were from Canadian unions, 37 (17.6%) were from U.S. unions, and 57 (27.5%) were from international unions. Eighty nine (44.5%) questionnaires were completed by union presidents, 14 (7.0%) by vice-presidents, 21 (10.5%) by secretary-treasurers, and 76 questionnaires (37%) were completed by other administrative staff members. Overall, the respondents of surveys used in the data analyses were in positions whereby

they should have accurate knowledge of their union's planning processes. Of the 209 responses, 51 (24.4%) indicated they engage in formal planning.

Section 1 of the questionnaire gathered background and demographic data, whether or not the respondent's union has a written plan that extends two years or more, who directs the planning, whether or not paid, external consultants are used, and the percentage of plans implemented since 1985.

Section 2 of the questionnaire included a list of possible plan content items, and respondents were asked to check all of the issues that they include in their planning. Section 3 contained items intended to measure respondents' perceptions of the effectiveness of their planning, as well as attitudes toward long-range planning. The respondents were instructed to indicate on a 5-point scale (1 = strongly disagree; 5 = strongly agree) their opinions of the effect of planning, the importance of planning, and the necessity of resource availability.

Measurement

Descriptions of, and where applicable, number of observations and reliability levels for all variables included in the analyses are presented in Table 1. All scales were designed *a priori*, and in their construction, simple unit weights were used.

For perceived plan effectiveness and the various independent variable scales, the items included for each were submitted to internal consistency estimates of reliability using Cronbach's coefficient alpha. Although the scale for plan importance had a fairly low alpha (.55), Cronbach (1951: 332) stated, "...a test need not approach a perfect scale to be interpretable. Items with quite low intercorrelations can yield an interpretable scale." Furthermore, if alpha is only .30, the measurement should be reconsidered (Nunnally 1978). Therefore, because the alpha was over .50, and due to its theoretical relevance, the measure was retained.

There are two dependent variables. First, EFFECT is a 3-item scale constructed to measure the perceived effectiveness of the long-range plan. Second, IMPLEMENTATION is an interval variable measuring the perceived extent of plan implementation. Extent of implementation was categorized based on respondent self-report as (1) less than 25%; (2) 25-50%; (3) 51-75%; and (4) 76-100%.

Eight independent variables are used in the analyses. The first independent variable, AMERICA, is a dummy variable measuring whether or not a union is American (i.e. the union has no branches outside the U.S.). This category includes 17.6 percent of the unions in the analysis. INTERNATIONAL is a dummy variable measuring whether or not a union has branches in both

TABLE 1
Descriptions of All Variables in the Analyses

<i>Measure</i>	<i>Description</i>	<i>Cronbach's ALPHA</i>	<i>Items (N [where applicable])</i>
Dependent Variables			
EFFECT	Perceived plan effectiveness	.69	1. The things outlined in our long-term plan(s) have been a great help to the growth of our union. *2. The majority of our long-term plan(s) have not really helped our union. *3. Our long term plan(s) have not helped our union improve its performance.
IMPLEMENTATION	Perceived extent of plan implementation		1. Since 1985, what % of long-term plans have been implemented.
Independent Variables			
AMERICA	Union is American		0 = Yes (17.6%) 1 = No (82.4%)
INTERNATIONAL	Union is international		0 = No (72.5%) 1 = Yes (27.5%)
CONSULTANT	Perceived usefulness of consultants	.85	1. The hiring of paid external consultants is essential if we are to greatly improve the operation and programs of our union. 2. The employment of paid external consultants has greatly aided the growth of our union. 3. Paid external consultants have been able to assist our union's development.
RESOURCE	Perceived resource availability	.67	1. There are enough people in this union to successfully implement our long-term plan. *2. The people involved in the implementation of our long-term plan(s) do not have the necessary skills to ensure its successful implementation. 3. The people involved in the implementation of our long-term plan(s) have enough time available to devote to its successful implementation.

TABLE 1 (Cntd.)
 Descriptions of All Variables in the Analyses

<i>Measure</i>	<i>Description</i>	<i>Cronbach's ALPHA</i>	<i>Items (N [where applicable])</i>
			*4. Our union does not have the right resources for the successful implementation of its long-term plan(s). 5. Our union has adequate money available for the successful implementation of its long-term plan(s). 6. The collective planning expertise of the regular staff and/or external consultants charged with implementing the plan(s) is adequate.
PLANIMPORTANCE	Perceived plan importance	.55	1. Our union places a high importance on long-term planning. 2. A large amount of staff time should be concerned with the administration and development of long-term plan(s). 3. Our union should not be involved in long-term planning.
PRESIDENT	President involvement in the planning process		1. Generally, who directs your planning sessions? (1 = president [68.2%] 0 = other [31.8%])
PARTIME	Proportion of membership who work part-time		
INDUSTRY			
Manufacturing			0 = No (76.5%) 1 = Yes (23.5%)
Service			0 = No (66.2%) 1 = Yes (33.8%)
Utilities			0 = No (81.9%) 1 = Yes (18.1%)
Publicadmin			0 = No (75.5%) 1 = Yes (24.5%)

* Recoded items

Canada and the U.S. This category includes 27.5 percent of the unions in the analysis. The omitted category comprises national unions, or those which do not have any branches outside Canada. These two measures were included to

determine whether or not any differences might exist based on each union's home country, or based on whether they represent members in only one or in both countries. CONSULTANT, is a 3-item scale designed to measure the perceived usefulness of paid external consultants who had been hired to assist the union in developing a long-range plan. This variable was included because the interviews conducted prior to the survey (see footnote 1) revealed that some unions do hire consultants to assist them in their planning processes, while others rely on internal resources. Additionally, the literature suggests outside consultants should be used whenever sufficient expertise does not exist within the group (Steiner 1963). RESOURCE is a 6-item scale designed to measure the perceived existence of human, financial and expertise resources available to union leaders in their planning processes.

PLANIMPORTANCE is a 3-item scale designed to measure the perceived importance to union leaders of a long-range plan. PRESIDENT is a dummy variable (1 = yes; 0 = no) indicating whether or not the union president directed most of the planning sessions. This variable was included because planning is typically a top executive function, and whether or not it even exists is dependent upon the leaders of an organization (Steiner 1963). PARTIME is a continuous variable measuring the proportion of union members who were part-time employees. Finally, a four category INDUSTRY variable, indicating the industry in which the union has a majority of their membership, is used to control for possible inter-industry differences in such union aspects as resource availability and opportunities to plan.

Data Analysis and Results

First, a frequencies analysis was conducted to determine the agendas of union long-range plans. Table 2 lists the results.²

The frequencies analysis indicates that member education, budgeting and political action are the three items most often included in union plans, while corporate campaigns, associate member programs, mergers and affiliations are least likely to be included.

² 110 respondents completed section 2, checking items they include in their planning, but only 51 met the criteria in Section 3 to be classified as long-range planners. All responses were included in the frequencies analysis as it was believed it was more informative to share content areas of concern, regardless of whether the unions conducted explicit or implicit planning relative to them. Additionally, this indicates that some unions conduct planning, but not on a long-range basis, as defined in this research.

TABLE 2
Information Included in Long-Term Plan(s)
Since 1985

<i>Item</i>	<i>Number of Times Item Mentioned</i>	<i>Percentage</i>
1. Member Education	83	75.5
2. Budgeting	81	73.6
3. Political Action	70	63.6
4. Bargaining Agenda	63	57.3
5. Surveying Members' Interests	63	57.3
6. Organizing in Traditional Jurisdictions	59	53.6
7. Bargaining Structure	58	52.7
8. Labor-Management Cooperation	52	47.3
9. Coping with Technological Change	51	46.4
10. Organizing in New Jurisdictions	46	41.8
11. Affiliations	34	30.9
12. Mergers	34	31.2
13. Associate Membership	20	18.2
14. Corporate Campaign	9	8.3

N = 110 except for items 12 and 14 for which N = 109

Two OLS regression analyses were conducted, utilizing only the data provided by respondents who stated they had written plans that extended two or more years into the future. The results of these analyses are presented in Table 3.

The EFFECT regression indicates that union leaders' perceptions of plan effectiveness are significantly related to perceived resource availability and perceived plan importance. The IMPLEMENTATION regression indicates that unions were significantly more likely to implement a greater proportion of their plans when union presidents directed the planning sessions rather than other individuals. The adjusted R^2 is .28 and .33 for each respective analysis, so the variables included in the analysis account for 28% and 33% of the variance.

The results also indicate that implementation was significantly higher when the perceived resource availability, and the membership ratio of part-time to full-time employees in the union were high. Additionally, CONSULTANT produced a negative effect on the extent of plan implementation, while unions in the manufacturing, service and utilities industries

implemented a significantly greater part of their plans than unions in public administration. Surprisingly, no significant differences were found between American, Canadian, and international respondents.

TABLE 3
Determinants of Union Leaders' Perceptions of
Plan Effectiveness and of the Extent of Plan Implementation
(Standardized solution; t-values in parentheses)

<i>VARIABLE</i>	<i>EFFECT</i> (<i>N</i> =51)	<i>IMPLEMENTATION</i> (<i>N</i> =50)
AMERICA	-.64 (-.83)	-.04 (-.14)
INTERNATIONAL	-.84 (-1.34)	.02 (.08)
CONSULTANT	.06 (.61)	-.11*** (-3.24)
RESOURCE	.25*** (2.92)	.06* (1.74)
PLANIMPORTANCE	.43*** (3.31)	.01 (.12)
PRESIDENT	.10 (.17)	.43*** (2.13)
PARTIME	.01 (.93)	.01* (1.74)
INDUSTRY ¹		
MANUFACTURING	.80 (1.16)	.46* (1.75)
SERVICE	.36 (.51)	.79*** (3.07)
UTILITIES	.99 (1.12)	.81** (2.49)
R ²	.44	.48
Adj. R ²	.28	.33

* Significant at .10 level, two-tailed test

** Significant at .05 level, two-tailed test

*** Significant at .01 level, two-tailed test

¹ PUBLICADMIN is the omitted category

DISCUSSION AND FUTURE RESEARCH DIRECTIONS

From Table 2 it appears that union plans cover a wide range of topics. The area most frequently mentioned, however, was member education. Educating members on union history, structure and operations is a key developmental tool unions can use to build union commitment and prepare volunteers for roles of greater responsibility within the union. Additionally, education on organizing strategies and techniques is an important component of union educational programs (Murray 1990). Further, given structural changes in the labor market, technological changes and declining memberships due to displacement, there is a much greater demand for union services such as education. Education is a direct service in that it can be provided to members outside a structure of collective bargaining, irrespective of company affiliation. Indeed, the AFL-CIO report on the Evolution of Work (1985) calls for a greater use of direct services as a means to boost union membership. Finally, preparing an education program likely entails a need for comprehensive planning.

It is no surprise that budgeting placed second, as this is a fundamental process for most organizations, and preparing a budget entails extensive planning. The third most frequently cited topic for planning was political activities. Given the amount of funds donated annually to political action committees (PAC) in the U.S. (Masters and Delaney 1987; Wilhite 1988), and the extent of political involvement in both Canada and the U.S., this result also comes as no surprise.

One quite interesting finding of this analysis was that bargaining and organizing, two traditional key activities of unions, only placed fourth and sixth, respectively, in terms of response frequency. Perhaps union leaders feel these functions are already developed to the point that little planning is needed, or that there is some understanding that if they are to revitalize themselves, national and international level officers should focus on other issues in their planning.

Overall, this analysis only scratches the surface of the content of union planning. Further research is needed in terms of why certain areas are singled out for attention, and what the plans specifically entail. Additionally, while this analysis indicates that U.S. and Canadian unions engage in similar planning topics, a more in-depth, qualitative analysis of unions in each country could provide further insight into major areas of concern. Undoubtedly the broad issues included in the survey are of interest to all North American unions, but specific issues such as the Free Trade Agreement and the Goods and Services Tax in Canada or health care in the U.S. need to be ascertained.

The findings on respondent perceptions of what leads to plan effectiveness and plan implementation were quite intriguing. It seems union leaders

agree that resources such as money, staff expertise, and staff time are critical to the effectiveness and implementation of union plans. As such, these results lend empirical support to the propositions outlined in past conceptual articles (e.g. Stratton and Reshef 1990).

Additionally, the greater the importance a union placed on planning, the more effective the plans were perceived to be. While this result is interesting, one problem is that a self-response bias may be present. Obviously, if the perception is that planning is important, the natural response might be that planning is also effective, and vice versa. In other words, the two are mutually supportive. Therefore, this question also deserves future exploration, using objective data sources to supplement perceptual data. Nonetheless, the results do seem to support the intuitive logic that union leaders must believe in planning if it is to be effective. One implication of this finding is that union leaders should be made aware of the importance of conducting planning.

In terms of implementing plans, it seems plans were implemented to a greater extent when the president directed the planning sessions. This result supports the proposition that leader vision, support, and actual involvement in planning are necessary if a union is to successfully implement its plans.

Another finding of this study is that the greater was the ratio of part-time to full-time employees among a union's membership the greater was the extent of plan implementation by the union. Perhaps unions with more part-time employees require more intensive planning and plan implementation if they are to maintain their organization in terms of membership recruitment and maintenance. Future research should, however, further explore this preliminary finding by focusing on the differences between those unions primarily representing full-time employees and those with more part-time employees.

One unexpected finding of this research was that the assistance of paid, external consultants was significantly and negatively related to plan implementation. It would be expected that consultants would assist the union in plan implementation, not impede it. Perhaps using the services of an outsider offends individuals charged with implementing plans, hence their negative report on consultant effectiveness. Another explanation might be that union officers who are involved in planning that is facilitated by external consultants feel less ownership of the plans, and so do not strive to implement them. Or, being unfamiliar with the union organization consultants may slow down the planning process and thereby retard plan implementation. Another alternative explanation is one of reverse causality, or that leaders who implement more of their plans are less likely to hire external consultants. Again, further research in this area to determine the reasons for this negative relationship is warranted as the results were quite counterintuitive.

Finally, unions in the manufacturing, service, and utilities industries were significantly more likely to implement more of their plans than unions in public administration. This finding may suggest that unions which enjoy a greater organizational stability and security in terms of attracting and maintaining membership, such as those in public administration (especially in Canada where they organize close to 70 per cent of the organizable workforce) have less need to implement their plans, thereby avoiding the economic and political costs which the process may involve.

CONCLUSION

This study was a first, and as such an exploratory, attempt to investigate the content, perceived effectiveness and implementation of plans by national and international unions in the U.S. and Canada. Overall, the results indicate that 24.4 per cent of the unions who responded actually engage in long-range planning. In other words, nearly a quarter are venturing into new administrative functions.

For those who do plan, member education, budgeting and political action are the most frequently cited topics. In terms of the perceived effectiveness of engaging in long-range planning, resources such as finances, staff time and expertise are critical. Additionally, the plan must be perceived to be important if it is to be effective. In terms of actual implementation of plans, again resources are critical, as are the support and involvement of the national union president. Consultants, however, are perceived as being negatively related to plan implementation. Finally, unions who represent a higher percentage of part-time employees, and those in the manufacturing, service and utilities industries are significantly more likely to have implemented a higher proportion of their plans.

This initial study is important to both practitioners and researchers in the field of labor relations. For practitioners, it is important that they share information and processes in terms of "what works" in confronting internal and external challenges. For researchers, it reveals that there is a major union function, long-range planning, which has been neglected in past research, and which now deserves attention.

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Planification de longue durée chez les syndicats nord-américains Résultats préliminaires

Depuis le début des années 1980, on a beaucoup discuté de la lutte menée par les dirigeants syndicaux nord-américains pour survivre malgré les nombreux défis posés par la situation économique. Tandis que plusieurs entreprises essaient de redevenir compétitives en recourant à de nouvelles pratiques de gestion, telles la gestion de la qualité et la responsabilisation du personnel, il y a peu de données empiriques sur de nouvelles approches conçues pour rendre sa vitalité au mouvement syndical. Cet article présente des données empiriques sur un moyen possible pour aider les syndicats à venir à bout de la turbulence qui les entoure : la planification de longue durée.

Cinq cents questionnaires furent postés à tous les présidents de syndicats nationaux et internationaux en Amérique du Nord. Deux cent neuf réponses ont pu être utilisées et parmi celles-ci, 51 répondants (24,4 %) ont déclaré faire de la planification de longue durée, c'est-à-dire avoir un plan écrit qui s'échelonne sur deux ans et plus. La première section du questionnaire portait sur des informations générales et des données démographiques. Elle cherchait ensuite à préciser si une planification pour deux ans et plus existait au sein du syndicat, qui en était responsable, si des consultants externes avaient été utilisés et le pourcentage de propositions mises en application depuis 1985.

La deuxième section du questionnaire incluait une liste d'éléments de planification possibles et la troisième contenait des questions visant à mesurer la perception des répondants au sujet de l'efficacité de leur planification et leur attitude à l'égard de ce processus de décision.

L'analyse des données révèle que les trois éléments les plus souvent prévus dans la planification des syndicats sont l'éducation syndicale, les aspects budgétaires et l'action politique. En ce qui concerne la perception de l'efficacité à s'engager dans une telle planification à long terme, les ressources financières, le temps et l'expertise du personnel sont les éléments les plus importants. De plus, le plan doit être perçu comme étant important pour être efficace.

En termes de mise en œuvre de la planification, ici encore les ressources matérielles et humaines sont fondamentales ainsi que le support et l'implication du président du syndicat. Les consultants, cependant, sont perçus comme étant un facteur négatif. Finalement, les syndicats qui représentent un pourcentage élevé de travailleurs à temps partiel et ceux que l'on retrouve principalement dans le secteur manufacturier et celui des services privés sont plus sujets à avoir exécuté une plus grande partie de leur plan.