

Union Planning: A Framework and Research Agenda

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Résumé de l'article

La planification, ou ce processus de définition d'objectifs et de moyens de les atteindre, constitue traditionnellement une des fonctions principales des gestionnaires. Curieusement, on a porté très peu d'attention au processus de planification chez les syndicats qui, après tout, doivent être gérés comme n'importe quelle organisation. Cette recherche examine la nature de la planification dans un contexte syndical afin de développer un cadre pour de futures recherches en ce domaine.

La plus grande partie des recherches sur la planification en relations industrielles vise ce sujet populaire qu'est la planification stratégique. Les connaissances existantes sur divers aspects de planification syndicale souffrent du manque d'un cadre théorique commun ; elles sont dispersées et décousues. Les chercheurs doivent approcher la planification chez les syndicats à partir du contexte syndical.

Notre thèse est à l'effet que les syndicats sont à la fois des entités politiques et des organisations conservatrices. Alors, ils hésitent à abandonner le statu quo, ce qui mène à la « rigidité stratégique » (Lawler 1990 : 46).

Comme tel, les efforts de recherche doivent reconnaître les qualités uniques des syndicats et les garder à l'esprit en examinant la planification chez les syndicats.

Pour circonscrire la nature de la planification chez les syndicats, nous avons eu recours à une approche qualitative combinant entrevues et analyse de documents. Nous avons effectué 28 entrevues avec du personnel de 16 organisations syndicales différentes. Des données colligées par ces entrevues, nous avons observé que le processus de planification chez les syndicats varient selon trois critères-clés : le type de planification (réactif, opérationnel et stratégique), le niveau dans la structure syndicale (section locale, régionale, nationale/internationale et fédérative) et des dimensions variables (court/long terme, de haut en bas/de bas en haut, focus interne/externe ou problèmes globaux/locaux). Ce cadre propose plusieurs avenues de recherche. D'abord, ces trois critères doivent être opérationnalisés et validés de façon empirique. Ensuite, il faudra se concentrer sur des études descriptives sur les processus et sur le contenu de la planification ainsi que sur des études évaluant les résultats de la planification. De telles recherches aideront les dirigeants syndicaux à connaître ce que les autres syndicats accomplissent et à faire le lien entre la planification et la performance.

Considérant l'environnement changeant actuel, les syndicats doivent planifier. Ce faisant, il devient critique que les chercheurs inventorient ce qui se fait et ce qui est efficace afin que les ressources ne soient pas gaspillées sur des processus non nécessaires ou inefficaces.

Union Planning

A Framework and Research Agenda

**KAY STRATTON DEVINE
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Planning is fundamental to all organizations, including unions. This paper presents a research framework and discusses future directions of academic research into union planning. Our findings indicate that union planning is manifested in various forms. Further, we propose that to capture the phenomenon adequately, researchers must approach it from a "union context," rather than building solely upon a management, economics or business policy framework.

Planning, or the process of setting objectives and deciding how to accomplish them, is traditionally cited as one of the main functions of managers. What is interesting is the fact that little attention has been devoted to union planning processes, even though a union must be managed much as any other organization. Consequently, we decided to investigate the nature of planning using a union context in order to develop a framework to guide further research in the area.

Union planning should be paramount today, given the unstable environment of global competition, technological changes, demographic shifts, deregulation, and privatization. Union leaders must plan how they intend to confront these challenges. As such, they should be proficient in the process, content, implementation and evaluation of planning. However, as a research community, we know very little about union planning.

Most of the available IR planning research centres on the popular topic of strategic planning, while other forms of union planning have been ignored.

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Whether a result of business policy frameworks guiding much of the research or the introduction of the strategic choice framework by Kochan, McKersie, and Cappelli (1984), the unique union characteristics that require a different planning perspective are ignored. The extant union planning knowledge further suffers from the lack of a common theoretical framework, and therefore is dispersed and disjointed.

Researchers must approach *union planning* from a *union context*, rather than building upon management, economics, or business policy frameworks. To facilitate a systematic investigation of union planning, this article advances a research framework and articulates future research directions.

PAST RESEARCH AND ITS LIMITATIONS

Two Views of Union Planning

Discussions of union planning typically result in one of two polarized viewpoints: (1) that union leaders are unable, or extremely limited, to act proactively; or (2) that union leaders should, and occasionally do, exhibit proactive behavior vis-à-vis their environment. Advocates of the first view focus almost exclusively on strategic planning and state that the strategic choice orientation is not viable for unions. Union leaders' strategic choices are constrained as they possess few discretionary powers to deal with external circumstances. Labour can only react to environmental changes (Gereluk 1990; Lewin 1987).

Proponents of the second orientation believe that the environment creates pressures with which traditional union practices are not suited to deal (Kochan 1992). Union leaders must adopt a new perspective, one feature of which is strategic planning (Murray and Reshef 1988). Where constraints do not curtail alternatives, leaders possess discretion over issues such as structure, internal functions, and future paths the union may pursue (Chaykowski and Verma 1992; Dunlop 1990; Fiorito, Gramm and Hendricks 1991; Kochan, Katz, and McKersie 1986; Kochan, McKersie, and Capelli 1984; Lawler 1990; Murray and Reshef 1988; Scheck and Bohlander 1990; Stratton and Reshef 1990). Although some leaders, staff, and members consciously plan and develop new strategies (Coates 1991; Heckscher 1988; Kochan and Katz 1988; Murray and Reshef 1988), their planning has yet to produce a new North American labour agenda for the future (Kochan 1992). Rhetoric outweighs concrete action.

Both viewpoints are supported by cogent arguments. However, little convincing empirical work has been offered in support of either view, perhaps because past research has been limited by the following factors.

Terminology

Semantic, operational, and measurement problems exist due to a confusion in the nomenclature and conceptualization of planning. Lewin (1987:13) stated that the "concept of strategy is vacuous," for almost anything a party does can be construed as strategic. Various prefixes such as short-term, long-term, comprehensive, strategic, operational, and formal, are affixed to "planning" by researchers who try to portray the phenomenon. In one instance, new terminology, "applied futuristics," was coined to describe union strategic planning (Shostak 1991).

Some scholars build on existing economic and business policy research by adopting corporate terminologies, definitions, and methodologies. Stratton and Brown (1988) proposed a typology of union strategic planning, following Kudla's (1980) business policy operationalization and survey methodology. Dunlop (1990) borrowed Andrews' (1980) formulation of corporate planning and strategy to describe union strategies. Scheck and Bohlander (1990: 71) utilized Pearce and Robinson's (1985) policy definition, while the term long-range planning was used by Reshef and Stratton-Devine (1992).

This suggests that researchers have used pre-existing models, rather than attempting to define planning in a union context. Unions are unique organizations, structurally and politically different from corporations. Accordingly, researchers must pay attention to these distinctive union characteristics.

The Political and Conservative Nature of Unions

Unions are political entities with distinct mandates and values (Dunlop 1990). They lack the profit orientation that drives the corporation, and noneconomic considerations may influence internal processes. Union officials' work is defined through a constitution. They are accountable to a range of stakeholders and must represent all members fairly through due process (Dunlop 1990; Freeman and Medoff 1984; Godard 1994). In short, unions are "democratic people-involved institution[s]" (Quaglieri 1989: 8).

Unions are required to conduct periodic elections of officers, which do not always result in executives who are chosen for their administrative skills. Most incumbents are reelected, but this is not guaranteed (Dunlop 1990; Quaglieri 1989). Officers must respond to their constituents' concerns or else risk their political future (Dunlop 1990). In such settings where tenure is unstable, officers may have little regard for long-term development (Fayol 1949), and may concentrate instead on short-term success.

There is also a need to communicate effectively and quickly with a large number of interest groups. Moreover, agendas change constantly, membership diversity is increasing, and the coalitions with which leaders

work may be unstable (Bryson 1988a, 1988b; Dunlop 1990; Kerr 1983; Kumar and Coates 1989; Rankin 1990; Ring and Perry 1985). Labour leaders rarely enjoy the administrative work required to deal with these challenges, as they are "doers," and would prefer to be out among their members rather than in an office (Quaglieri 1989). All of these factors influence the nature of planning.

Unions are also conservative organizations, typically reluctant to abandon the status quo (Craft 1991; Hecksher 1988; Kochan 1992). A pragmatic "business unionism" philosophy reflecting a drive to advance and protect members' economic interests has existed in North America since late in the 19th century (Galenson 1986; Godard 1994; Perlman 1928). While unions can serve other functions, such as support of social reform, officers may hesitate to commit resources to experiments with new processes or strategies. This leads to an inability of most unions to cope quickly with change, or "strategic rigidity" (Lawler 1990: 46). This, coupled with a "sluggishness of spirit," makes them "prisoners of inertia" (Raskin 1986: 3).

In sum, research programs must acknowledge the political and conservative nature of unions which, in turn, influences the content, scope, range, and pace of planning.

METHODOLOGY

To discover the nature of union planning and to ground the proposed research framework, we used a qualitative approach combining interviews and document analysis.

Data Sources

Twenty-eight interviews (23 in-person and 5 via telephone) with personnel from sixteen different organizations were conducted. The in-person interviews ranged in length from one to two hours, while the five telephone interviews ranged from ten to forty-five minutes. Of the twenty-eight individuals, sixteen were elected officers (president, vice-president, or secretary-treasurer), eleven were hired staff members (executive assistant, research director, or organizing director), and one was a private consultant advising unions on planning. Six of the participants were based in the United States, while the others were in Canada (20 from western, and 2 from central Canada).¹

1. Although the substantive content issues varied between the two countries, the characteristics of union planning did not. Consequently, all 28 interviews were used to develop the union planning framework.

Six individuals represented local level views, eight worked on a regional, or intermediate level, nine were from a national or international office, four were from a federation, such as the AFL-CIO, Canadian Labour Congress, or provincial federation, and one was a private consultant. Table 1 presents interview participant demographics.

TABLE 1
Interview Participants
(N = 28)*

Breakdown by Public/Private Sector

	<i>Local</i>	<i>Intermediate/ Regional</i>	<i>National/ International</i>	<i>Federation</i>
Public	1 officer	2 officers 2 staff	1 officer	2 officers 2 staff
Private	5 officers	3 officers 1 staff	2 officers 6 staff	

Breakdown by Manufacturing/Service Sector

	<i>Local</i>	<i>Intermediate/ Regional</i>	<i>National/ International</i>	<i>Federation</i>
Manufacturing	5 officers	3 officers 1 staff	2 officers 6 staff	2 officers 2 staff
Service	1 officers	2 officers 2 staff	1 officer	

* 27 participants were union officer or staff, while 1 was a private consultant

The sample unions were deliberately selected to provide a diverse cross section in terms of sector (e.g., public/private and manufacturing/service), size (e.g., ranging from a local of 14 members to an international of 160,000 members), membership characteristics (e.g., education level) and structure (e.g., centralization or decentralization).² Because we wanted the sample to represent a diverse cross section, the number of unions in each cell in Table 1 was fairly small. Overall, however, enough data were

2. A list of unions which participated in the interviews is available upon request.

collected to allow some basic preliminary conclusions, especially in terms of possible avenues for further research.

Data Collection and Analysis

Data were collected via interviews and document analyses. The interviews were bounded by an interview guide developed by the authors to gather consistent information across participants. This provided a means to discern patterns or trends (Miles and Huberman 1984), and replications are the best means for validating facts (Glaser and Strauss 1967). While the major areas of inquiry were dictated by the guide, the use of open-ended questions to follow up on areas of interest was not precluded. All interviews, with the exception of the five telephone conversations and one in-person discussion in a noisy location, were tape recorded and transcribed to decrease researcher bias and to enhance reliability.

Next, a contact summary form (Miles and Huberman 1984) was devised for recording main patterns, or recurrent central ideas. Based on the transcripts, each interview was analyzed by completing a contact summary form. Two independent researchers reviewed the data for themes which captured the central ideas in an interview (Bjorkegren 1989). This step allowed for the categorization of the planning actions described by the interviewees (Martin and Turner 1986). Finally, union documents were analyzed for supportive and supplementary information.

UNION PLANNING FRAMEWORK

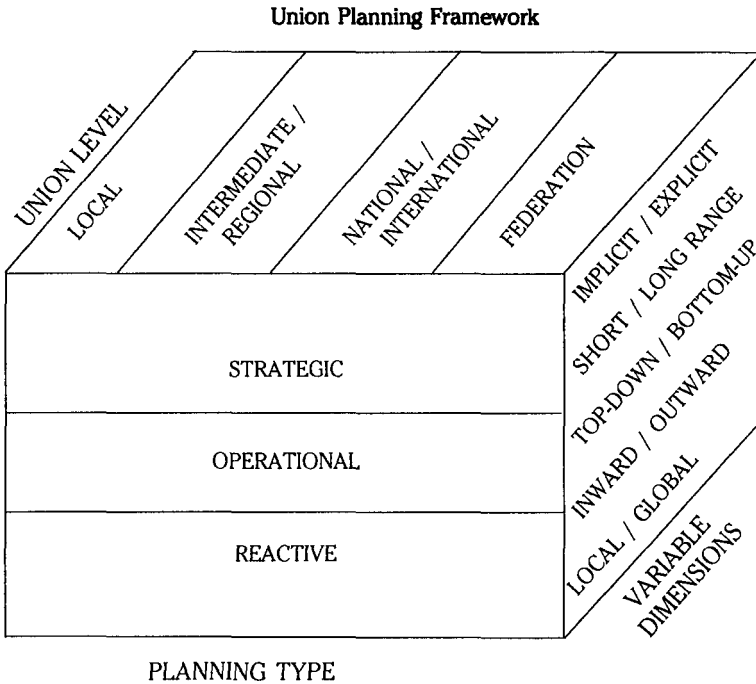
The data indicate that union planning processes differ according to three key criteria: planning type (reactive, operational, and strategic), union level (local, regional/intermediate, national/international and federation), and variable dimensions (explicit/implicit, short/long range, top-down/bottom-up, internal/external focus, or global/local issues). These criteria constitute the framework presented by Figure 1.

Types of Planning

Descriptions of planning processes revealed that unions engage in three types of planning: reactive, operational, and strategic. Reactive planning consists of quick, ad hoc plans in reaction to unexpected stimuli. Such planning occurs in all unions, and consists of incremental, disjointed decisions.

Three interviewees characterized reactive planning as an "action by the seat of the pants" mentality. For example,

FIGURE 1



corporations make plans as to the direction they would like to go (and are in) the driver's seat. We don't have that latitude... Decisions to change the workplace have come to our attention with such short notice that it's not even funny.

When unions are confronted by rapid change, they can choose to do nothing (i.e., "nonplanning") and accept a situation as given, or to formulate quick, reactive intentions on how they will respond to such unexpected stimuli. These reactions are deemed to be planning because they constitute specific intentions on which the officers act (Mintzberg 1975).

Operational planning is the development of plans that guide a union's daily operations. Compared to reactive plans, operational plans are more orderly, following a predetermined schedule. According to interviewees, operational planning addresses issues such as budgeting, collective bargaining, staffing, and the general operations of the union. As stated by one local president, "operational planning would be more appropriate in my job... I am, by and large, doing the day-to-day work at the union." All of the participants recognized the existence of, and the need for such planning.

Finally, interviewees describe what they call strategic planning as: (1) futuristic thinking based on a vision for the union; (2) an evaluation of potential opportunities and threats; (3) the formulation of strategies chosen from various alternatives which are designed to cope with future challenges; and (4) involvement of, or consideration of member needs, wants and ideas from all levels of the organization. The first three aspects mirror corporate planning processes, but the fourth element, the inclusion of rank and file views, distinguishes union from traditional business planning. One union mission is to represent the concerns and interests of the rank and file, so many leaders firmly believe that member input is critical to the planning process. Also, because leaders are elected, they must acknowledge their members' concerns. As stated by one president:

I have to answer to the people at election time, every three years. If they have confidence in the way I act, then I'll get restored to power. If they don't have confidence in my vision, then... what you have to do, at some point, I think, is ask 'do I want this job for longevity, or to be the most effective I can be?'

All but one of the officers used the term "strategic planning." When describing the process, however, a variety of responses was received. One federation executive distinguished strategic from operational planning by saying, "you can have long-term goals, but they aren't strategic. Unions must look at their existence and examine their needs." Another representative stated that strategic planning produces a "game plan, or a theory that will take unions through a period of time." Each union has its own definition and process, for there are no universal guidelines driving the phenomenon. This coincides with Burgelman's (1983) observation that when it comes to strategy formulation, different organizational contexts are associated with different strategic processes.

Union Level

The data indicate that the higher up in the union hierarchy, the more global, sophisticated and strategic the planning becomes. This finding supports Lawler's (1990: 39) statement that "choice processes may reasonably be expected to differ across hierarchical levels within unions." The second union planning differentiation factor is based on the vertical dimension of union structure (Fiorito, Gramm, and Hendricks 1991). For the purposes of this framework, the vertical dimension includes four tiers, with the lowest tier consisting of local unions, the second tier being regional bodies or intermediate units of national unions, the third consisting of national or international bodies, and the fourth representing umbrella federations such as the American AFL-CIO, the Canadian Labour Congress (CLC), or provincial federations.

Table 2 presents the sample's breakdown of type of planning by union level. Local level unions primarily engage in reactive and operational planning, while at the national, international, or federation levels, it is more likely that all three types of planning occur. Interviewees attributed this to the availability of resources and the role and responsibilities of officials at each level. At the federation, national or international level, resources and expertise are more plentiful. Individuals at these levels are further removed from the day-to-day "firefighting" activities typically found on the local level. Furthermore, they possess a broader view of the organization and environment, and feel it is their role to blaze a trail or formulate a mission to guide unions into the 21st century.

TABLE 2
Planning Type by Union Level

(N = 24)*

	<i>Local</i> N = 7	<i>Intermediate/ Regional</i> N = 5	<i>National/ International</i> N = 9	<i>Federation</i> N = 3
Reactive	100%	100%	100%	100%
Operational	71.4%	100%	100%	100%
Strategic	14.3%	40%	88.9%	66.6%

* While the sample included 16 unions, in some cases, individuals at different levels within one union participated. Hence, total N equals 24.

Variable Dimensions of Planning

As already noted, planning differs considerably from one union to another. As such, each union represents a distinct point along the following continua.

Implicit/Explicit. One continuum of union planning is represented by implicit, unwritten processes on one end, and explicit, written processes on the other.

A deliberately implicit approach is adopted by some leaders. Plans are not always written, and frequently are found only in the president's head who communicates them when the timing seems right (Steiner 1963). For example, one officer, in speaking about how one of their union programs started, said:

It developed up here [pointing to his head] for a period of about two years...I got my senior staff together... It was a beautiful May afternoon, so we walked to [a local cafe], sat down, ordered a glass of wine, and I said what about this... and everybody agreed to it.

This officer tacitly planned the program, and then shared the idea with his staff to implement, without proposing it in writing, or delineating action plans. An international staffer observed,

There's so little (explicit) planning because it takes the direction of the organization out of the hands of the president. The president wants to call all the shots. They don't want anything in writing.

In contrast, other interviewees described formalized processes, ranging from scheduled, ongoing sessions to weekend retreats with staff and representatives. It seems that size (in terms of personnel and discretionary resources available (Kimberly 1976) and degree of centralization affect the degree to which planning processes are implicit or explicit. One large, fairly autonomous local within a decentralized international union structure, engaged in very explicit, detailed planning. The smaller locals in the sample engaged in no explicit planning processes. This finding supports past research which concluded that increased size is related to increased formalization of organizational activities (Hall 1987), and that decentralization leads to more decisions being made at lower levels (Melcher 1975).

Short/Long-Range. Another dimension is time frame. In some cases, the plan implementation time is fairly short, while other plans demand a longer period. According to one national organizer:

In organizing, we do plan... and we have long-term projects and, of course, we have numerous short-term projects where we set targets for ourselves... Long-term [projects], we're talking about 5, 6 years.

A local president stated:

The plan of action must be flexible depending on circumstances of the environment around you. We started with our values, and now have set short-term goals. With the short-term plans, you want early success, so you can build on it... We're still working on our long term goals, which are concerned with things like major growth and reorganization.

Interviewee responses indicate that the time frame of planning varies depending upon the environment, the issues of concern, and the need for immediate action.

Top-down/Bottom-up Direction. Leadership style also differentiates union planning, as management styles "run the gamut from participatory to autocratic" (Quaglieri 1989: 7). For example, one local president said:

The leader is the key to it. If there's not someone with vision, it doesn't happen. If someone below in the ranks has vision and the leader doesn't, then you end up with an internal conflict.

Other individuals made it clear that the planning is not strictly an executive function. A national organizer stated:

The strategic overall planning for our union is done on several different levels. The people who are responsible for actually implementing planning are the directors... They make decisions about where we're going to go and when we're going to do it... But the input to strategic planning comes from a number of sources: our members, through the local unions, because it's not an individual voice — it's a collective voice; staff certainly have a great say. The districts then merge, or form part of the national scene, and the national scene makes a decision about Canada.

Most interviewees emphasized that while the union's vision emanates from the officers, issues and suggestions are generated by the general membership and staff.

The process may also be concomitantly top-down and bottom-up. As stated by a planning facilitator:

A lot of it [the plan] was shot down [by the members] and then restructured, and rebuilt up again. But that's healthy dialogue, and I think that's the democratic way that unions work.

Inward/Outward Focus. The focus of the planning also varies. Most plans concentrate on issues linked to factors external to the union, such as collective bargaining, political action, or environmental issues. However, some participants mentioned that their plans also contain an inward focus, for example, in staffing or budgeting. One regional officer observed that her union needs to do more planning on internal policies and procedures:

We own this building and we also lease space... When I came here and wanted to look through the property management files, they looked at me and said, "What?". It's those kinds of things, like the maintenance of the building and administration. Like managing the union itself... I don't know for the most part if they're the things unions don't want to deal with because that's not what we're here for, and true, I think our priority has to be our members. But there's never really any planning given to... the business side.

Local/Global Issues. Planning issues present another variable dimension. On the local level, issues center on topics such as collective bargaining, job security, budgets, and items salient to direct membership gains and services. On the national or federation level, issues are more global in scope, encompassing areas such as environmental concerns, women's issues, questions of freedom and democracy, or international affairs. For example, a construction trades local officer, when asked to compare their planning issues with those of a federation said,

The people at the Fed [Federation], you know, are the save the whales, and owls, and seals, and save the world. Construction unions aren't like that... We insist on buildings that comply with safety standards.

On the intermediate, or regional level, there is a mix of local and national topics. A regional research director stated: "One predominant issue

is organizing. Second are contract issues. Third are legislative concerns." On the national level, the scope is much broader, as suggested by this excerpt from one national union's Futures Report:

In a sense, the Committee decided to try and identify global trends, to then see where Canada fit within those global developments, and to design a set of responses, both structural and policy, to these developments, globally and nationally. We decided to build our own crystal ball and then to gaze into it and build our future.

In sum, there is a range of planning issues, from local bargaining and organizing, to national politics, to international environmental concerns.

FUTURE RESEARCH DIRECTIONS

The proposed framework captures the main union planning differentiation variables. While any variable combination is possible, some combinations are more likely than others. For example, national leaders are more likely to engage in strategic planning than local leaders. Still, the framework provides for the inclusion of any option, such as local strategic planning.

This framework suggests several research directions. First, the three differentiating criteria must be operationalized and empirically validated. Although the framework is appropriate for our sample, there may be additional elements or changes required before it represents all union planning in North America.

Attention should be directed toward (1) further descriptive analyses of processes and content; and (2) evaluative studies of planning outcomes. Both descriptive and evaluative research will assist leaders by exposing them to what other unions are doing, and by relating planning to performance.

Descriptive Analyses

Researchers should investigate what planning processes occur for each type of planning at each union level, and which variable dimensions are appropriate. For instance, we propose that locals mainly engage in reactive planning which is implicit, short-range, bottom-up, inwardly focused, and concentrated on local issues. In contrast, international bodies or federations are more likely involved in strategic planning which is explicit, long-range, top-down, outwardly focused, and concentrated on global issues.

Another line of research would be to determine whether or not there is a trickle down, or cascading effect whereby lower union levels are more likely to engage in the various planning types when higher levels engage in

such processes. The current data indicate that, in many cases, the local explicitly plans when its (inter)national is also involved in such processes.

Second, questions abound when describing what union personnel actually do in their planning processes. For example, who is involved in the sessions at each level for each planning type? The role of officers should be explored since, according to Kochan and Katz (1988), leaders must be able to weigh options, make decisions and secure member support for those decisions.

A third research path should target questions of content. Guided by the framework, research should determine what issues are most likely to be addressed at each level for each planning type. Moreover, inwardly focused union functions, such as budgeting or staffing, and outwardly focused activities, such as political action, collective bargaining, or organizing, may require different processes involving different personnel. For example, it is not known whether unions engage in piecemeal planning, addressing each activity individually, if they develop one master plan for all activities, or both. Research is therefore needed on what topics are addressed and how, or if, they are integrated into a holistic scheme.

Fourth, research should address the determinants of the propensity to plan by examining various contextual contingencies. For example, a union's sector of activity (public vs. private; manufacturing vs. service) may suggest leader propensity to plan strategically. Organizational size or resources may also determine the existence of different types of planning. Finally, leader characteristics such as beliefs, values, or skills may provide a key as to which processes may occur.

Evaluative Analyses

This article and the proposed framework focus on planning processes, thus neglecting planning outcomes. The most crucial question is whether there is a linkage between planning and performance. It has been claimed that planning may be a "sterile process, one which is oriented merely to the production of documents, the existence of which frequently fails to result in any meaningful change" (Higgins 1978). It is important to determine if union plans are realized, and what resultant changes occur. For unrealized plans, it may be that individuals or coalitions within the union have low commitment to the decisions, thus creating implementation roadblocks (Guth and MacMillan 1986). Research could determine potential roadblocks, thus informing union leaders of possible hazards.

The role of organizational context and its relationship to planning effectiveness must also be determined, for each organization exhibits unique contextual characteristics. As already suggested, the degree of centralization

and the role of leaders may affect planning type and effectiveness. An interesting question is whether the vision and strategic direction for a union should emanate from the top to increase the likelihood of plan implementation, or whether success in plan implementation is more likely if such matters are decided jointly by top leaders and rank and file members.

CONCLUSION

A general union planning framework has been proposed, using the elements of type of planning, union level, and variable dimensions to differentiate the varied components. While past research has simply asked whether unions do or do not plan, or can or cannot plan, we propose that planning is a complex, multifaceted, multilevel phenomenon which requires a new perspective and further study. This article provides a framework that integrates the fragmented literature on the topic and suggests future research paths.

Union planning processes raise several intriguing research questions which should be of interest to industrial relations scholars and practitioners alike. For too long, research has ignored union administrative practices. Given today's environment, unions must plan. In so doing, it is critical for research to determine what is being done and what is effective so that resources are not wasted on unnecessary or ineffective processes.

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RÉSUMÉ

La planification organisationnelle des syndicats : un programme de recherche

La planification, ou ce processus de définition d'objectifs et de moyens de les atteindre, constitue traditionnellement une des fonctions principales des gestionnaires. Curieusement, on a porté très peu d'attention au processus de planification chez les syndicats qui, après tout, doivent être gérés comme n'importe quelle organisation. Cette recherche examine la nature de la planification dans un contexte syndical afin de développer un cadre pour de futures recherches en ce domaine.

La plus grande partie des recherches sur la planification en relations industrielles vise ce sujet populaire qu'est la planification stratégique. Les connaissances existantes sur divers aspects de planification syndicale souffrent du manque d'un cadre théorique commun ; elles sont dispersées et décousues. Les chercheurs doivent approcher la planification chez les syndicats à partir du contexte syndical.

Notre thèse est à l'effet que les syndicats sont à la fois des entités politiques et des organisations conservatrices. Alors, ils hésitent à abandonner le statu quo, ce qui mène à la « rigidité stratégique » (Lawler 1990 : 46). Comme tel, les efforts de recherche doivent reconnaître les qualités uniques des syndicats et les garder à l'esprit en examinant la planification chez les syndicats.

Pour circonscrire la nature de la planification chez les syndicats, nous avons eu recours à une approche qualitative combinant entrevues et analyse de documents. Nous avons effectué 28 entrevues avec du personnel de 16 organisations syndicales différentes. Des données colligées par ces entrevues, nous avons observé que les processus de planification chez les syndicats varient selon trois critères-clés : le type de planification (réactif,

opérationnel et stratégique), le niveau dans la structure syndicale (section locale, régionale, nationale/internationale et fédérative) et des dimensions variables (court/long terme, de haut en bas/de bas en haut, focus interne/externe ou problèmes globaux/locaux).

Ce cadre propose plusieurs avenues de recherche. D'abord, ces trois critères doivent être opérationnalisés et validés de façon empirique. Ensuite, il faudra se concentrer sur des études descriptives sur les processus et sur le contenu de la planification ainsi que sur des études évaluant les résultats de la planification. De telles recherches aideront les dirigeants syndicaux à connaître ce que les autres syndicats accomplissent et à faire le lien entre la planification et la performance.

Considérant l'environnement changeant actuel, les syndicats doivent planifier. Ce faisant, il devient critique que les chercheurs inventorient ce qui se fait et ce qui est efficace afin que les ressources ne soient pas gaspillées sur des processus non nécessaires ou inefficaces.

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(Sélection de textes/Selected Papers)

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