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# What are the consequences of a managerial approach to union renewal for union behaviour? A case study of USDAW

## Introduction

Trade union membership losses and declining effectiveness in the United Kingdom (UK) over a sustained period of time have been described as a ‘crisis’ and subsequently, have spurred debate on union revitalisation and renewal (MacDonald, 2014). Following this debate, a reformist discourse has developed with a range of union renewal strategies and responses identified in the literature, predominantly focused on organising, servicing and partnership approaches. Renewal has often been underpinned by one of two theoretical perspectives: institutional determinism, whereby external factors shape the fortune of trade unions; or, strategic choice, whereby unions are influenced and shaped by internal and external factors and can exercise strategic choice in responding to these factors (MacDonald, 2014). Less attention has been directed ~~paid~~ in the union renewal debate ~~however, upon~~ to unions as organisations; ~~on~~ their internal management practices, the managerialisation of unions, or the ~~ir~~ ability of unions to leverage internal resources and practices through strategic choice (Hall, Fiorito, Horn, and Langford, 2011).

There does exist a small body of research that considers the ‘managerial renewal’ of trade unions (e.g. Heery and Kelly, 1994; Willman, 2001; ~~Back~~ Bach and Kolins Givan, 2008; Waddington and Kerr, 2009; Thomas, 2013) and internal drivers for change (e.g. Heery, 2005; Levesque and Murray, 2010; Murray et al, 2010). Nevertheless, any shift towards managerialism within trade unions is something that has been sorely neglected by employment relations specialists (Bach and Kolins Givan, 2008). This neglect is despite the term being used

over twenty years ago by Heery and Kelly (1994) in their notion of hybrid approaches, whereby unions can adopt more than one approach to internal union renewal. Using union servicing as their focus they identified three different approaches, including managerial unionism; ~~in fact, which moved the literature forward by coining this e~~ term ~~managerial unionism~~. The ~~is~~ concept of managerial unionism was further developed by Heery in 2003, when he identified managerial renewal as deriving from centralised, strategic management and decision-making reflected in systems of performance management. Such managerial strategies and internal work organisation are said to be a crucial determinant of the behaviour of trade unions (Turnbull, 1988). Hence, we argue that more work on the strategic capabilities of unions, with a focus on internal trade union management practices, and their impact on trade union behavior, is needed. As such, our paper focuses on the concept of managerialism to shine a light on the strategic capabilities of unions and how they leverage their internal resources to bring about renewal (Boxall and Haynes, 1997; Campling and Michelson, 1998; Levesque and Murray, 2010).

In this paper we explore the concept of managerialism, considering the consequences of a managerial approach to renewal for a union's behaviour, which we define as the study of social behaviours within a union. We do this by analysing the UK's fourth largest trade union – The Union of Shop, Distributive and Allied Workers (USDAW). In drawing on the notion of managerialism, we also acknowledge the problem of inconsistent definitions within the literature. The term is ~~further~~ undermined by disparate conceptual frameworks which tend to study aspects of managerial renewal in isolation, typically either: the professionalisation of union roles (Thursfield, 2012; Thomas, 2013); leadership-led or centralised renewal strategies (top down) (Charlwood, 2004; Simms *et al* 2013); or, the use of private sector performance management techniques (Heery 2005, 2006; Bach and Kolins Givan, 2008). In contrast, we

conceptualise these three aspects of managerialism concurrently to empirically explore how they impact upon union behavior. Such an approach has not previously been undertaken in the UK or other advanced market economies. This contribution is important, because to date, the literature has tended to overlook the notion of managerialism and its impact on union behaviour (Dempsey and Brewster, 2009; Hall et al, 2011; Thomas, 2013) at a time when it is argued that unions must avoid overreliance on the state (Milner and Mathers, 2013) and instead adopt innovative organisational structures to renew (Bouneaud, 2007).

The paper's empirical contribution is strengthened by the fact that USDAW has a close working relationship with the leading supermarket retailers having been long recognised as an exemplar of a union engaging in partnership with employers (McIlroy, 1998; Haynes and Allen, 2001; Heery, 2002; Parker and Rees, 2013), yet little recent analysis considers any subsequent adoption of managerialism. The retail industry in which USDAW operates provides a further pivotal, empirical focus for this paper. There is little research on retail unions and retail unionism is not well studied or understood (Coulter, 2013). Yet, the industry presents significant challenges to trade union activities, evidenced by rapid retail expansion and the dilution of union density, high labour turnover, a youthful and feminised workforce, the prevalence of atypical working arrangements and a high proportion of small businesses (Lynch *et al.*, 2011). Despite these challenging conditions, USDAW's membership has grown 26 per cent over the last six years (Parker and Rees, 2013).

The paper is structured as follows. The next section contextualises managerialism within the union renewal discourse. A detailed description of the methodology underpinning the single case study of USDAW is provided in the third section of the paper. The methodology is followed by a presentation of the research findings according to the three dimensions of

managerialism. The final section of the paper discusses the consequences of managerialism for USDAW's behaviour.

### **Managerialism and trade union renewal**

The concept of strategic choice and unions as strategic actors is not new (e.g. Campling and Michelson, 1998; Fiorito ~~et al~~, [Jarley and Delaney](#), 2001; Heery, 2002, 2005; Milner and Matthews, 2013) with Boxall and Hayes (1997: 568) arguing that in a neo-liberal environment union effectiveness depends on the strategic choices unions make. Indeed, in their analysis of trade union mergers, Campling and Michelson (1998) argued that environments did not directly determine the unions' strategies and concluded that union agency was key to union success. Heery's (2006) survey of union officers corroborated this when he concluded that internal factors could be as strong, if not stronger, than the institutional context for change. In further support, Nowak (2015: 688) cites USDAW as an exemplar when arguing that unions remain powerful agents in shaping their own destinies. Such findings only emphasise the importance of strategic choice and internal factors for renewal.

Accounts of union renewal have, to date, tended to focus on uni-directional strategies in terms of organising ~~versus~~ servicing ~~and versus~~ partnership; external ~~versus and~~ internal sources of change; ~~and~~ or rank-and-file (grass-roots) ~~and versus~~ leadership-oriented (centralised) renewal strategies (Heery, 2003; Simms, Holgate and Heery, 2013). However, such ~~simplistic~~ basic approaches, typical of the union renewal literature, do not adequately reflect or explain the complexity of union strategies. As Heery (2005) concluded, change within organisations is more likely when there are multiple sources of influence. Similarly, Waddington and Kerr (2000) suggested ed that organising and servicing are mutually reliant concepts. These debates highlight the need to challenge existing conceptual frameworks to

address concerns about the uni-directional and often prescriptive approaches ~~in of~~ the union renewal literature (De Turbeville, 2004; Simms and Holgate, 2010).

In our focus on managerialism within unions, we acknowledge that studying unions through an organisational lens is not a novel approach (e.g. Child, Loveridge and Warner, 1973; Hall et al, 2011) and that the bureaucratisation and professionalism of internal decision making in unions are seen by some as an inevitable development (Offe and ~~Wie~~isenthal, 1980). Indeed, in other domains such as the public sector, the voluntary sector and political parties, there has been a general acceptance towards the adoption of managerialism (Walsh, 1995; Dart, 2004), with the homogenisation of organisational practices likened to institutional isomorphism (DiMaggio and Powell, 1983). Yet, the prevalence of managerialism in unions and the consequences for union behaviour remains under-researched (Bach and Kolins Givan, 2008).

Unions have been referred to as dual entities, existing between democratic voluntary organisations and an administrative structure that demands efficiency and as such, leaves space in between for the prevalence of managerialisation (Thomas, 2013). Such tensions have also been argued to have arisen in the pursuit of partnership strategies. Some scholars have criticised partnership agreements for compromising unions' independence from management (Gall, 2001), which could conceivably increase channels of circulation between corporations and unions giving scope for managerial modes of practice to develop. In addition, ~~some scholars~~others have argued that a centrally driven approach and leadership strategies are an antecedent to organising and union renewal (Hickey et al, 2010), and similarly, that organising as a strategy to renew, constitutes a top-down managerial approach (Waddington 2003; Allen, 2009). This retention of centralised control for organising has been termed the 'mobilising' model (Lustig, 2002), and is argued to enable oligarchic forces to sustain current forms of

governance, goals and methods of unions (de Turberville, 2004: 780). As such, the managerial approach to union renewal has often been embedded within theoretical models of union organising and internal approaches to managing staff (Waddington and Kerr 2000; Bach and Kolins Givan 2008; Dempsey and Brewster 2009; Simms et al. 2013).

The term 'managerialism' suffers from definitional incongruity in the employee relations literature with a range of terms utilised to depict the concept, including: managerialisation (Thomas, 2013); managerial-led renewal (Heery and Kelly, 1994; Bach and Kolins Givan, 2008; Waddington and Kerr, 2009); managed activism (Heery, 2003; Simms, 2007; 2013); and leadership-oriented renewal (Charlwood, 2004). The managerialism concept has also tended to focus independently, on three key themes: leadership-led or centralised renewal strategies (top-down) (Charlwood, 2004); the use of private sector performance management techniques in unions (Bach and Kolins Givan, 2008); or, the managerialisation of union roles (Thursfield, 2012; Thomas, 2013). Our paper brings together these three dimensions of managerialism to propose a conceptual framework for analysing how such an approach to renewal shapes and impacts union behaviour.

First, centralised management is defined as organisationally directed (top-down) strategy or change and closely aligns with Charlwood's (2004) notion of leadership-oriented renewal (e.g. Waddington, 2003; Allen, 2009). Such an approach is contrasted with member activism and a rank-and-file driven approach to union renewal (e.g. Danford *et al.* 2002). Meanwhile, 'managed activism' is presented as an intermediary position between top-down and bottom-up approaches (e.g. Simms, 2007; Heery and Kelly, 1994) intended to address the tensions that exist between the democratic structure of unions and a more centralised, leadership-oriented approach (Thomas, 2013).

Second, the notion of performance management has been increasingly introduced in unions (Heery, 2003; Heery, 2005; Bach and Kolins Givan, 2008; Waddington and Kerr, 2009; Thursfield and Grayley, 2016). Such performance management systems are argued to take place [within](#) a unitarist framework (Mather and Siefert, 2011), seeking to improve performance through the measurement of achievement (Decramer, Smolders, Vanderstraeten and Christiaens, 2012). [Withi](#)In unions, these systems have been found to broadly encompass planning, targets and the monitoring and evaluation of performance (Heery, 2003, 2006; Waddington, 2003). These developments in unions have been influenced by initiatives promoting new public management in the public sector (Dart, 2004) and encompass undertones of disciplinary practice whereby performance management is used to assess accountability to control individual behaviour (Harper and Vilkinias, 2005). [However, t](#)The tensions between democracy and bureaucracy that typically characterise trade unions (Thomas, 2013) and their collective participatory principles (Martinez Lucio, 2012<sup>4</sup>) potentially provide some challenge to the underlying unitarist and individualistic assumptions of performance management.

Third, the context, role and experiences of full time officers are increasingly managerial in nature, illustrated by the use of ‘managerial language’ and a shift away from ideological, political roles (with high levels of autonomy and discretion for union officers as professional employees) to ~~more~~ competency-based roles (Heery and Kelly, 1994; Thomas 2013). Thursfield (2012) found that while union officers related to traditional definitions of professionalism, the role was changing to become more managerial, despite their [attempts efforts](#) to resist such change. In practice, the managerialisation of union roles manifests itself in training and an increased emphasis on qualifications and implementation of formal organisational structures and reporting lines (Heery, 2006; Thursfield, 2012). This latter



dimension of managerialism also reflects practical developments and imperatives; for instance, the TUC's Leading Change training program, premised on providing management and leadership training to union officials lacking such capabilities (~~TUC~~ [Trades Union Congress, 2016](#)).

Drawing on the three concepts of managerialism (centralised strategy, performance management and managerialisation of roles), we explore a central research question within USDAW: What are the consequences of a managerial approach to union renewal for union behaviour? To this end, we draw on Booth's (1984) oligarchic and democratic models of union behaviour, ~~which built on earlier debates in the literature on in relation to union behaviour~~, particularly the seminal work on unions as oligarchies (Michels, 1915; Lipset, 1956). In doing so, ~~Booth (1984) she~~ provides a foundation for defining union ~~behaviour~~ by ~~comparing contrasts~~ the centralised approach of oligarchy (whereby full time officers hold a monopoly of power facilitated by low participation and apathy of union members); with the democratic model's devolution of power and representation of member interests. While Booth (1984) adopted the democratic model of union behavior, she did not discount that some unions may better fit the oligarchic model.

Heery (2006) draws on Booth (1984) in his ~~agency and articulation model, which offers an empirically-driven framework that extends Booth's (1984) work and speaks to the main dimensions of union behaviour. His~~ discussion of an agency account of union behaviour based on the exercise of strategic choice ~~is~~; akin to Booth's (1984) democratic approach. ~~This~~He contrasts this with the 'articulation' approach, likened to oligarchic or bureaucratic models of union behavior, whereby the union operates a hierarchical model in which performance management is used to direct officers towards goals valued by union leaders (Heery 2006:

463). In his study, Heery rejected the articulation model because he found support for a more developmental form of managerialism. Martinez Lucio (2012<sup>+</sup>) added to the debate when he discussed the inherent tensions between democracy and bureaucracy in trade unions and the role of union ‘managers’ in articulating the discourse of bureaucracy. As such, we seek to make a ~~Our~~ theoretical contribution ~~that seeks to build~~ on this body of literature by exploring how the three elements of managerialism have consequences for union behaviour in terms of oligarchic or bureaucratic approaches versus ~~more~~-democratic or agency behaviours. Our empirical contribution lies in the analysis of USDAW’s managerial approach to renewal - USDAW is the fourth largest trade union in the UK in a notoriously challenging industry for unionisation. The next section of the paper describes the methodology underpinning the study and the methods employed in ~~more~~ detail.

## **Methodology and Methods**

The purpose of this paper is to explore the consequences of a managerial approach to renewal for union behaviour. To address this question we use a single case study: USDAW, enabling an in-depth exploration of managerialism and union behaviour drawing upon an interpretivist paradigm (Mills, Durepos & Wiebe, 2010; Snape & Spencer, 2003). The focus on a single case study, USDAW, is in part justified by two competing scenarios: USDAW’s actual membership gains over the past six years which stands in contrast to negative membership outcomes for most other UK unions, vis-à-vis declining union density for USDAW due to retail expansion. These contrasting factors illustrate a need to look beyond ‘performance’ measured solely on the basis of union membership figures, particularly in an industry that is readily seen as being challenging (and at times hostile) to trade unions (e.g. Lynch *et al.* 2011).

To address the complexities of USDAW's approach to union renewal and organising, and the complexities of union behaviour, our research focused on senior officers within USDAW who hold primary responsibility for the design and implementation of union strategy. This small sample ~~of officers~~ was purposively selected on the basis that this group of officers would enable us to explore union behaviour at the organisational level and therefore address our research objective and question. Whilst we acknowledge that a degree of breadth is required to improve the validity and transparency of data (Alvesson and Ashcraft, 2012), our research study was primarily interested in using an interpretive research approach to produce rich, extensive and insightful material. Why? An interpretivist approach was the most suitable approach to study our research question which required an understanding of USDAW's leaders in their natural setting, to make sense of how they interpreted and brought meaning to managerialism and to understand and interpret their broader social reality of union renewal and the consequences for the union's behavior (Snape & Spencer, 2003).

Access to USDAW was gained through personal contacts, based on the authors' prior research on this union. This paper draws on in-depth semi-structured interviews conducted with the General Secretary of USDAW and six out of the seven regional divisional officers in USDAW<sup>1</sup>. The ~~six~~ regional divisional officers all had a minimum of ten years' experience in the job and represented the following regions: South West, Midlands, North West, North Eastern, London/South East and Scotland. In terms of social profile, the interviewees had come from families with union involvement, though to varying extents, and all had an interest in political issues. Most had been union representatives since their teenage years and had previous

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<sup>1</sup> Divisions cascade from the national level of USDAW. The divisions are comprised of branches. There are 550 branches in total in USDAW presently. Each member and representative (delegate) is attached to a branch within their geographical division (USDAW 2016).

experience of working in the retail and distributive industries immediately after leaving school at sixteen years of age. Their main responsibility in their role as divisional officers, was to manage the team of full time employed organisers within their area and to meet the recruitment targets. This team of organisers could comprise be between ten and up to twenty organisers, depending on the size of the region both within and outside of ‘the big four’ supermarkets; commonly known as ,which comprise Tesco, Sainsbury’s Morrisons and the Co-Op.. These Organisers are responsible for organising within their region, i.e. rRecruiting new members while but also havehaving some responsibility for some-servicing tasks such as the complex case work; whether that be cases of discrimination or harassment by way of examples.

All interviews were conducted on-site at USDAW regional offices in Spring 2012. Interviews ,were two hours in duration and with participants’ permission were ,conducted on-site, digitally recorded and then transcribed. The rationale for interviewing the General Secretary and Regional Divisional Officers, as alluded to previously, -was that such an approach enabled an understanding of macro-level strategy and behaviour, in addition to their dissemination and implementation of the strategy at the local level (divisions), and thus, the subsequent-shaping of union behaviour at local levels, in terms of the influence of officials on members and delegates- (from the perspective of officials themselves)at local levels. In addition to the in-depth, semi-structured interviews, organisational documents, prior empirical research on USDAW (e.g. Parker & Rees, 2013) and internal memoranda were considered and analysed.

Analysis of the data was on-going during and after fieldwork. All three researchers (authors) read the interview transcripts to generate respondent-led analytical themes (Snape & Spencer, 2003) of the consequences of managerialism for union behaviour. These analytical categories

were then further developed through comparing and contrasting these themes with the main arguments in the literature. Using themes from the literature, alongside an analysis of respondents' meanings, processes and contexts uncovered during the interviews, we were able to map and re-present the social world of the research participants in USDAW through interpretation of their social meanings of managerialism and the consequences for the union's behaviour.

Before turning to a description of the background to the USDAW case, we acknowledge that the research has some limitations. First, the sample size is small and representatives (delegates) and members (rank-and-file) were not included in the sample. Notwithstanding this limitation, we argue that the sample size adopted is in line with recommendations for in-depth qualitative research that draws on a relatively homogeneous participant group (e.g. Guest, Bunce and Johnson, 2006; Saunders, 2012). We also contend that our focus on behaviour through the lens of the General Secretary and divisional officers, rather than the rank-and-file, is consistent with the theoretical framework of a managerial approach to organising and renewal. Our focus on union behaviour also complements and enriches existing research that concentrates to a much greater degree on workplace level union representative roles and thus individual's behaviour (e.g. Murray, Levesque, Dufour and Hege, 2013; Simms, 2013). Second, the research is highly situated in the retail and distribution industry and therefore is not generalisable to other industries. However, it is important to note that generalisability was not our objective; rather, an in-depth exploration and analysis of USDAW's behaviour. Notwithstanding these limitations, we acknowledge that future research on union behaviour could include officials, representatives and members for a more comprehensive and triangulated understanding, and, could explore potential tensions between union officers, representatives and members' behaviours.

### The Union of Shop Distributive and Allied Workers (USDAW)

USDAW has been in its current form since 1947 and has 434,000 members (Certification Office, 2014) representing workers employed in shops, factories and warehouses alongside drivers, call centre workers, meat packers and pharmaceutical employees. The union has made membership gains in recent years, growing ~~by~~ 26 per cent or ~~by~~ 84,000 members since 2006; ~~yet although~~ union density remains low across the retail sector at 11.9 per cent as a whole ~~(BIS,~~ 2015) and lower than ~~private sector union density in the UK at which is~~ 13.9%. Overall, UK union density is ~~at~~ 25%; ~~the retail sector represents less than half this total~~ (Business, Innovation and Skills, 2016)

Relative to other trade unions in the UK, USDAW has been characterised by a more integrative approach to employers. ~~The is~~ approach ~~to employers~~ is underpinned by a partnership strategy (Haynes and Allen, 2001; Parker and Rees, 2013). The union has also invested in organising (Heery, 2002), and ~~in 2004,~~ the election of a new General Secretary ~~in 2004~~ saw the continuance of a moderate yet more managerially focused leadership compared with the ~~leadership of the~~ 1990s ~~leadership~~ (Heery, 2002:24). This movement towards organising led to a change in the role of full-time officers and in part, was managed through natural wastage, the appointment of new employees and the upgrading of organisational measurement systems (Parker and Rees, 2013).

In 2000, USDAW set up its own organising academy, following in the footsteps of the TUC, and sought to implement a bespoke organising model that aligned with the demands of the retail sector. In accordance with this shift to organising, USDAW developed a new strategic planning process as a means to enhance management capability including the adoption of a strategic management plan for all divisions and head office (Parker & Rees 2013). In light of this background to USDAW [as the case study](#), we now turn to a detailed explanation of the research findings.

## **Research Findings**

In accordance with our research question, we analyse the consequences of managerialism for USDAW's behaviour under three dimensions: leadership-oriented, centralised strategies; performance management; and, managerialisation of union roles.

### *Leadership-oriented, centralised strategies*

Two central themes that emerged from the interviews regarding the consequences of a leadership-oriented centralised strategy for USDAW's behaviour were: union direction and organisational change. With regard to union direction, the General Secretary, as prime influencer, discussed leading the employees of USDAW guided by his strategy that "all employees should know what their sense of purpose is, what the union's goals are and what you can do to deliver that". One divisional officer elaborated on USDAW's modus operandi, suggesting, that in contrast to some other more militant unions:

"USDAW has always been regarded as a moderate union. I don't think that means weak, I think what it means is that we prefer to resolve things by talking and we often feel that

we get more by discussing things in a calm way than by jumping up and down and shouting”.

With regard to organisational and cultural change, the General Secretary clearly explained that this process derived from the top:

“We’ve had to learn by our own experience. And of course looking at successful organisations about how they manage. So we’re not a ~~pte~~-[public limited company](#) so we don’t have shareholders, but we knew, and I knew instinctively, if this union was going to take advantage of the opportunities to influence employers but grow alongside that, then we had to look at the way we manage this organisation”.

When asked to evaluate USDAW’s strategic journey, the General Secretary commented that the union was only forty percent towards where they wanted to be in their strategic plan to achieve maximum effectiveness, pinpointing the importance of aligning planning and the organisation’s strategic direction. The General Secretary did feel however that “the strategy put USDAW ahead of other unions, because there is a business model”. As he put it: “You can blame the government; you can blame the employer...but look at yourself first”.

The caricature of union officials as “clumsy managers” was identified by the General Secretary who talked about the union’s behaviour in the context of a hierarchical employer and organisation. He explained that this perception of clumsiness may stem from the eradication of the ‘closed shop’ and the fact that a “captive audience (compulsory membership) had now gone”. The General Secretary went further, comparing the union to large private sector organisations:



“It’s not Tesco and it’s not Sainsbury’s and therefore the dynamics are different but what isn’t different is that we’re still a multi-million pound organisation that has a responsibility to spend the money sensibly and if we are ambitious about the membership, we need to have the right campaigns and strategy”.

This sentiment of the General Secretary denotes a tendency towards private sector practices and the importance of centralised leadership in directing organisational strategy and behaviours on the ground. However, in initiating change, the General Secretary and his deputy also demonstrated an understanding that there was a need for employee buy-in: a need to take union employees ‘on the journey’ if they were to be successful. In retrospect, he commented:

“We knew we couldn't go from what we did to a new way of working by some idea. It had to be a cultural shift, an attitude shift about why we were doing it and the purpose.”

A third theme related to leadership and centralised strategy and the consequences for union behaviour that pervaded the interviews was the importance of top-down decision making pertaining to recruitment. This manner of decision making was also linked to the industry context: the need to recruit 60,000 members each year due to employee turnover in the retail industry (Parker & Rees, 2013). The General Secretary referred to this behavioural dynamic as being “constantly on the treadmill”, depicting the sheer volume of recruitment activity required and the pressure this placed on the union to investigate member turnover and reasons for turnover. In order to address this, the General Secretary decided there was a need for a “modernisation programme, involving policies on how [they] managed the union”. It is also conceivable that USDAW’s partnership agreements with leading supermarket retailers, and as a consequence, the close proximity of the General Secretary to senior managers, encouraged leadership and centralised strategy akin with private sector management techniques and therefore more ‘managerial’ behaviours. Such close working relationships expose USDAW’s

senior management to models of managerialism and provide greater opportunity for organisational practices to pass from firm to union.

A move to leadership-oriented and centralised strategy in USDAW necessarily meant a change in divisions and the creation of leadership roles to enact the “new business model”. One officer described this change as:

“I lead rather than manage but maybe that’s me being nice about myself. My role is to support the area organisers, help them, guide them and manage them if they’re not doing it, whereas my role a few years ago would have been to ‘just keep the problems down’”.

This officer’s comments hint at the role of ‘performance management’ and it is this theme that we turn to next.

### *Performance Management*

Consistent with the shift to a leadership-oriented, centralised strategy, performance management techniques were a key focus within USDAW and, ~~as~~ part of the modernisation programme and renewal efforts since 2009. USDAW, consistent with their change in direction, implemented specific targets for recruitment encapsulated in the ‘Managing Your Patch’ Guide for full-time officers. Within this guide, precise objectives for full time officers were included detailing the expectations of each officer in workplaces in their geographical area (patch). The targets were based on membership and density growth, enhancing the profile of USDAW, training representatives (activism) and developing an understanding of their patch and effective industrial relations. These targets subsequently served as a tool to measure performance and each officer would manage their own progress on these objectives, in addition to undertaking performance reviews with a line manager. This change to full-time officer roles placed a new emphasis on managerial skills, such as coaching, leadership and team development,

representing fundamental behavioural shifts in the union-officer roles in USDAW. The General Secretary described this approach as having a “business model [to] measure what we are doing’. With regard to progress against measurable recruitment targets, one area officer commented:

“We have an overall target of 13,000 new people this year [2012]....with two or three weeks to go we are on 12,500 so I think we have done very well. We tend to concentrate on an overall target, and on looking at the big four [supermarkets] as well”.

In addition to the development of strategic planning, USDAW invested in information technology systems to support the management strategy. These systems produced monthly reports that measured full-time officers’ performance against targets and were ‘managed’ by divisional officers. Organising and financial objectives were seen to be more achievable than targets for people and delivery, necessitating extensive and routine surveys of representatives to measure progress. In addition to the performance management processes, all senior managers in the union were expected to undertake a compulsory management development programme focused on skills and behaviours, in addition to undertaking 360 degree performance analyses, training needs analyses and external coaching.

Targets within USDAW are related to the bespoke organising strategy which in turn, is informed by a comprehensive mapping process. This mapping process involves, *inter alia*, identifying new and existing stores in geographical areas, new ‘starters’ in stores and actively recruiting new representatives. The General Secretary summed up performance management as organisers being “part of a team, with clear, measurable and achievable targets”, which he felt was delivering dividends. This perception of success is reinforced by USDAW’s actual

membership growth since 2006; notwithstanding that membership growth is only one measure of success.

With regard to recruitment targets in USDAW and consequences for behaviour, the basic measurement criteria, as identified by the General Secretary, are designed to measure what union employees “do”. That is:

“How many men, how many women, how many full and part time, how many shop stewards, what stewards’ training has been provided [and] has anyone been nominated for the awards ceremony”.

The General Secretary did however acknowledge behavioural resistance to this type of measurement approach from both individuals and ‘managers’: “of course officials like independence; they don't necessarily like to be managed”. There were degrees of behavioural resistance however. As one area manager said, referring to the union’s practice of performance management:

“We’re still as an organisation quite soft. We look after our people, we’re not hard line, not many officials have been dismissed, and we’re not performance managing people out of the door”.

Consistent with Thursfield and Grayley’s (2016) study of performance management in trade unions, enforcement of performance management, in terms of poor (“bad”) performance of union officials, was weak in USDAW, thus enabling individual autonomy and discretion in the execution of recruitment and organising to targets, irrespective of a managerialist (centralised) agenda.

One divisional officer discussed the performance management issue using a different frame, identifying the pressure that such techniques place on representatives' behaviour at the workplace level, thus reinforcing the democratic versus efficiency tensions in trade unions:

“Some of the people in the union get carried away and forget that our representatives are volunteers. They are not employees and sometimes they are treated as if they are employees. I am a little unhappy at that, but that's one or two people that get carried away and think of themselves as a manager of a group of employees, which they are encouraged to do by the union”.

Performance management processes in USDAW extended to regional full-time officers in the form of performance development reviews undertaken twice yearly by divisional officers, to ensure, as one divisional officer described it: “joined up management in the division”. Such processes inevitably had an impact on the role and behaviour of union officials, as discussed in the following section.

### *Managerialisation of union roles*

One major theme that emerged from the interviews which was consistent with USDAW's emphasis on performance management ~~and had~~with subsequent consequences for union behaviour, was a change to union officials' roles. As the General Secretary stated: “most officers in the union are ‘ex’ shop stewards, they are not managers, they are managers by default...the next stage is how we develop competent managers”. The change in culture and experience this represented for union officials was in stark contrast to the established conceptualisation of their role and reflected the traditional analogy of us versus them; that is union versus corporation:

“In the trade union movement, if you'd used the word ‘manager’ years ago, it would have been seen as a ‘dirty word’ because officials and representatives are still suspicious of

the word ‘manager’ because their experience is sitting opposite a manager” (General Secretary).

Union officials did however refer to themselves as ‘managers’ and ‘being managed’ throughout the interviews and adopted managerial language. Notwithstanding this dominant managerial discourse, some longer serving union officers were uncomfortable with the requirement to take on a managerial role: “that is not the way I see it, I cannot comply...I do not wish to comply with this new way of working” (Divisional Officer). As a consequence of the expected changes in role and behaviours stemming from managerialism, some officials had taken retirement or left the union.

In exploring union officers’ career paths, it was apparent in USDAW that officers tended to progress through the full-time career route, meaning those officers in senior positions had long tenure. The career path of said full-time officers meant that few had formal qualifications or education, which inhibited them in the context of the changing behavioural and substantive requirements of the role: that is, the transition to ‘managers’. This difficulty of meeting the change is illustrated in the following comment from one divisional officer:

“[They] are intimidated in terms of how to fill in forms, how to write reports...so we’ve had to think about how we train them and support them. We know they’ve got raw talent, they can communicate, they are committed to the values of the trade union, but they may have a skill gap so we’ve been doing a lot of work to up-skill them”.

The long tenure of union officers combined with a flat organisational hierarchy resulted in a lack of career progression for USDAW’s employees. The union’s response was to focus on the skills of individuals and use horizontal movements to maximise the performance potential of its staff. The General Secretary noted that:

“Although there are not great career opportunities because people do not tend to leave, what we’re doing is moving people to other departments to work....and finding out, to be honest, that there are people within USDAW who have been locked away in one department that could offer an awful lot more but we never encouraged it and now we do and we are excited about it”.

This horizontal movement has further embedded a managerial culture and behaviours within USDAW, reinforcing that for officers to become ‘effective managers’ and achieve the union’s performance targets, they need a degree of formal line management. As the General Secretary stated, this approach is illustrated through the Organising Academy: “we do training....the academy spots talent....potential officials for the future”. A focus on skill development and managerial rhetoric and practice was further evidenced by the approach of divisional organisers, who proactively identified “who needs extra support, coaching or training [through] regular development plans....and personal development reviews” (Divisional Officer). Such an explicit behavioural focus on the line management of staff with accompanying training and development is indicative of a shift to managerialism and a more corporate mode of operating. As the General Secretary stated: “in the commercial world, this is not new”.

A further change in the full time officers’ roles was the removal of discretionary behaviour and autonomy in their daily activities. Delegation of responsibilities through a managerial approach led to a perception that officers lower down in the hierarchy “nag and complain when you give them something new to do” (Divisional Officer). It was also acknowledged by a divisional officer that the increasing demands being placed upon union officials meant that “they are always busy and some get burnt out”.

The overarching change in the nature of full-time officers' roles in USDAW was a consequence of the focus on performance management and centralised strategies borrowed from private sector organisations. One divisional officer summarised this as encapsulating: "a strategy...a plan... work plans for efficiency", and from the perspective of the union's behaviour, reflected "an evolution...modernisation...[was] more managerial". However, according to the General Secretary, in making this transition, the union adopted a consultative approach with union officers and representatives by involving them in the setting of performance targets for recruitment and by regularly conducting surveys of both members and employees to evaluate and monitor progress and success.

In summary, the managerialisation of union roles within USDAW was indicative of the managerial renewal agenda. In speculating on the future of the managerial agenda, the General Secretary stated: "My vision is to get the union representatives so well developed, so well trained, so well supported that they will do the job for us and [USDAW's] reputation grows".

## **Discussion and Conclusions**

The purpose of this paper was to explore the consequences of managerialism for union behaviour. In light of the disparate strands of research and definitional incongruity in the literature, we have drawn on three concepts of managerialism in conjunction: centralised strategy, performance management and managerialisation of roles, using a single case study of USDAW. This study is important because without such knowledge of internal organisational techniques and practices, we lack a comprehensive understanding of the true complexities of how unions organise and renew, both conceptually and empirically. It is important to reiterate however that USDAW's managerial strategy was not independent of their existing strategies



of partnership and organising. As a result, their approach to renewal was more reflective of a hybrid approach; an approach that is less commonly presented in the literature.

Our research identified features of managerialism being operationalised at USDAW with evidence of Charlwood's (2002) leadership-oriented renewal approach and Lustig's (2002) mobilising model in place. Senior officials within USDAW played a key role in 'articulating' strategy through their focus on strategic choice as a path to renewal. The prevalence of a centralised approach to the setting of work plans for efficiency, managerialisation of union roles and performance management targets and systems were all evident in USDAW. This managerialist approach supported formal line management and limited 'agency' as a source of change. These findings correspond with Heery's (2006) study, although unlike Heery (2006), we found greater more support for a hierarchical model of articulation and the use of performance management to direct union officers towards goals and influence individual behaviour (Harper & Vilkinas, 2005). Targets set and monitored centrally undermined notions of democratic and collective behaviour (Martinez Lucio, 2012<sup>1</sup>).

Our research shows how USDAW's leadership clearly ascribed strategies evoking change through the adoption of business models supported by performance management systems, the latter commonly associated with the private sector. This adoption had significant implications for union officials' roles with a demonstrable shift towards competency based roles and responsibilities alongside reduced agency, to some degree supporting the conclusions drawn by Heery (2006) and Thursfield (2012).

After establishing the prevalence of managerialism in USDAW, we then considered the consequences of this approach for union behaviour. There was some evidence of Booth's

(1984) oligarchic model of union behaviour and ‘articulation’ as a major source of change at USDAW, with a leadership-oriented articulation of strategy and purpose (Heery, 2006) reflecting underlying elements of bureaucracy (Martinez Lucio, 2012<sup>+</sup>). However, the inherent tensions between democracy and efficiency mediated these oligarchic forces to challenge the basic concept of managerialism, which had consequences for union behaviour. Therefore, despite the centralised approach and adoption of private sector managerial practices, roles and accountabilities, tensions between articulation and agency brought about a ~~more~~ consultative approach to strategy and performance management which also included management training for developmental purposes. This earned USDAW the descriptor of being a “soft organisation” ~~and more~~ in line with Booth’s (1984) democratic model of union behaviour.

However, USDAW was also susceptible to its external context and it is undeniable that the retail sector shaped and continues to shape USDAW’s strategy and approach. Managerial dimensions such as recruitment and organising were a high priority, as were short-term recruitment targets due to the industry’s high levels of labour turnover. This dynamic resulted in a subsequent requirement to be efficient in recruiting, mapping organising and a focus on performance management. As argued by Martinez Lucio (2012<sup>+</sup>), these short term priorities in the retail context gave rise to bureaucracy. In fact, the prevalent influence of industry context on USDAW’s renewal approach is consistent with previous research on this union (O’Brien & Rigby, 2010).

In addition, our research found that USDAW’s leadership considered the pursuit of managerialism as legitimate:— a view potentially influenced by their exposure to private sector practices through their ‘partnership’ ~~relationships~~ with the four large supermarket retailers. In line with criticisms of such partnerships compromising union independence (Gall, 2001), this

exposure to private sector management techniques could be seen as emerging evidence of organisational isomorphism (DiMaggio & Powell, 1983). It suggests that institutional dynamics exert a strong pressure on USDAW towards managerialism and an oligarchic model of union behaviour. The drive for efficiency and effectiveness, characteristic of the managerial approach, manifested in important behavioural consequences for the organisation though manifest at the individual level: employee turnover (of union organisers) and at times, burnout or undue pressure being placed on rank-and-file members (delegates in the workplace), as a result of a spillover effect from the pressure on union organisers as paid employees of the union, to focus on targets and managerial techniques.

Our research also illustrates how USDAW's managerial strategy operated alongside other renewal strategies around organising and partnership, supporting the argument that such strategies are mutually reliant concepts (Waddington and Kerr, 2000). Building on deTurbeville's (2004) argument that a centralised approach to organising facilitates oligarchic forces, we suggest that this can be extended beyond organising to cover a range of renewal strategies. That is, while managerialism is a core component and focus of USDAW's strategy, established strategies of organising and partnership operate in conjunction, expanding and complicating the dimensions of union behaviour. Such findings reflect a ~~more~~ hybrid approach and we again find support for de Turbeville (2004: 776) in his view that unions are diverse organisations that require a plurality of renewal approaches rather than a one-size-fits-all model.

Despite an inability to explain causation in this paper, and it is important to reiterate that this was not our intention nor objective, the findings have a number of practical implications. Our findings suggest that tensions between bureaucracy and democracy will mediate the extent to

which managerialist approaches can be used within unions, adding support to the strategic choice theory and underlying arguments that unions can influence their fortunes (e.g. Campling and Michelson, 1998; Heery, 2006; Heery and Simms, 2008; Nowak, 2015). However, institutional and external pressures could see managerialism becoming more prevalent, with oligarchic and bureaucratic forces prevailing (deTurbeville, 2004; Martinez Lucio, 2012+). This pressure is particularly applicable to those unions operating in challenging contexts, such as USDAW, in the retail and distribution industry, whereby the stages of union development may be playing out (Offe and Weistenthal, 1980). If this is the case there are wider societal implications whereby collectivism and worker led democracy could become scarcer within unions and the workplace, thus irretrievably altering the nature of the employment relationship. In terms of the micro level, the managerialisation of unions has consequences for union officers; with officers facing increasing pressure in their roles to behave as managers, with attendant implications for role conflict, identity and motivation. Trade unions such as USDAW, need to be aware of the potential long-term consequences of their investment in managerialism and the concerns raised in the literature about any movement towards bureaucracy and articulation modes of behaviour within ~~trade~~ unions.

In terms of future research, previous claims in the literature that organising to renew actually constitutes a managerial approach (e.g. Waddington, 2003; Allen, 2009) clearly warrant further investigation. It might also be useful to adopt an institutional isomorphism framework to augment the debate around institutional determinism versus strategic choice. Further research could also ~~explore study~~ managerial renewal strategies over time, adopting a longitudinal research design together with a broader sample of respondents, to further probe the boundary conditions as to when ~~explore the success of~~ managerial approaches to union renewal are successful or not, and the consequences for union behaviour. This type of ~~Such~~ deeper analysis

can help to describe and explain the circumstances under which managerialism as a component of union renewal; is effective and, ~~for~~ the barriers to union behaviours and change under a managerialist approach.

In conclusion, USDAW has focused on strategic choice as a path to renewal through its use of internal resources and internal management practices to leverage organising and recruitment. Thus, our study, in part, answers calls in the literature to focus on unions as organisations and their internal power resources (e.g. Levesque and Murray, 2010; Hall *et al*, 2011; Thomas, 2013) and therefore makes a contribution to the emerging literature on internal management within trade unions. Our findings also support Heery and Simms's (2008: 40) conclusion that unions are not absolutely determined; they can manage themselves. Yet, despite evidence of an oligarchic model of union behaviour within USDAW, tensions between articulation and agency were also apparent and had subsequent mediating consequences for union behaviour, giving rise to a degree of democracy and agency for union officials in a managerial environment; what ~~can~~ can arguably be termed and best represented as a hybrid approach. The adoption of a managerialist approach within trade unions, evidenced in this case by USDAW, has implications for union renewal, democracy and union strategy, and thus, practicing trade union managers and leaders.

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