

# TRAINING THE FRONT-LINE UNION MAN

*a study report and  
recommendations for  
training shop stewards*

The time, effort and money spent on training activities by industrial firms stems from a recognition of their valuable contributions to the organization. Indeed, this recognition may virtually lead to an automatic response from managers to prescribe some form of training for solving any and all industrial problems. However, training is not a panacea for all industrial ills and should be instituted only when a program can meet a specific, definable need. Research conducted by this writer indicates a requirement for a reappraisal of the training available to the front-line union man, the shop steward. The purpose of this article is to demonstrate the need for, and in general terms the scope and content of, a new approach to a steward training program.

In the case of an industrial worker who lacks the specific skills to perform a particular job, management has several basic alternatives for eliminating the situation. One solution would be to remove the under-skilled worker and hire a technically-qualified person. Another approach might be to redesign the job to fit the skills of the incumbent. The obvious problems associated with this solution will not be discussed here. A third solution might be to train the incumbent to a level of skill so he could do the job.

The first or third solutions might be satisfactory, within reasonable limitations, in an industrial situation.

In the case of an unskilled shop steward, the problem does not have as many alternative solutions. First, the steward is normally an elected union official. Therefore, he cannot be replaced by management with another steward, who may be better qualified in management's opinion, to serve in that capacity. Since, except in unusual circumstances, the steward will complete his term of office, it would appear that the only way for the steward to achieve the necessary job skill is to acquire it through some type of training.

The degree of sophistication and the

level of effectiveness desired in the steward's performance will determine the magnitude, type and content of the training.

## EXISTING TRAINING PROGRAMS

Before discussing the existing shop steward training programs, it is desirable to note some aspects of the research conducted by this writer. Data concerning the job of the union steward was collected from relatively large companies, most of which utilized mass production methods in their operations. For example, some of the products manufactured by the firms were paint, paper, electronic components, steel, fertilizers, chemicals, bakery and food goods, aircraft and rocket components, wire and cable, glass, rubber items, small motors, transformers, cans, beer and farm machinery. In addition, some information was collected from individuals employed by public utilities.

The methodology used in the research was the personal interview with data being collected from shop stewards, foremen and union business agents. The research was directed at determining, in considerable detail, the job of the shop steward and in constructing a standardized model outlining the job he should perform. Table I verbally depicts the model developed. This model is the guide used in determining the training that should be performed to ensure that the steward is adequately prepared to perform his job.

Numerous activities are being performed today which bear the title of steward training programs. Such programs vary widely in scope. For example, the entire training program for one newly-elected steward this writer interviewed consisted of his being handed a contract booklet and given a few words of orientation from his predecessor. The most valuable part of this orientation process was the admonition of the predecessor to check with the chief steward and the business agent before doing anything.

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**TABLE I**  
**THE STANDARDIZED UNION STEWARD JOB MODEL**

**GROUP I**

**Personal Relations**

- (A) Maintains friendly relations with:
  - (1) Management
  - (2) Union officials
  - (3) Working peers
- (B) Is temperamentally suited to performing the tasks of the union steward
- (C) Makes a favorable impression
- (D) Has a strong public relations sense

**GROUP II**

**Man-centered Factors**

- (A) Knows the steward's job
- (B) Knows and understands contract provisions
- (C) Has the authority and the support of his peers and superiors in doing his job
- (D) Exercises considerable personal leadership in doing his job
- (E) Is a hard worker on the job
- (F) Is an effective personal and administrative communicator
- (G) Conducts thorough research of all projects he undertakes

**GROUP III**

**Job-centered Factors**

- (A) Effectively presents workers' grievances to management
- (B) Makes contract recommendations to union officials
- (C) Enhances morale whenever possible
- (D) Is effective in the areas of:
  - (1) Job evaluations
  - (2) Safety
  - (3) Scheduling of working hours
  - (4) Wages and salaries
  - (5) Promotions
  - (6) Transfers, lay-offs and discharges
  - (7) Overtime work
  - (8) Authorized and unauthorized absences

**"DO-IT-YOURSELF" TRAINING**

This on-the-job training philosophy appears to be reflected, to some extent, in the official shop steward's manual, where it is stated that:

Good stewards learn something new about the steward's job every day. They learn primarily by handling grievances, by studying the contract, by getting accurate facts from the members and by taking part in many union activities . . . It is going to take a little while to learn all the things the manual says you ought to know. You won't find all the answers right away. By studying the manual and using common sense . . . you can do your job better.<sup>1</sup>

This "do-it-yourself" philosophy was given an ancillary modification by the promulgation of a teaching guide<sup>2</sup> designed to provide a formal program for teaching the steward the job delineated in the official shop steward's manual.

This is a "teachers' aid" type of manual. It has a suggested detailed outline for presenting six lessons, of approximately one and one-half hours duration each. The subject matter consists of: (1) the steward's job; (2) grievance preparation; (3) handling the foreman; (4) contract provisions; (5) labor legislation and political education; and (6) knowing the union.<sup>3</sup> In addition, there are suggestions concerning the conduct of each session, including the exact words that should be used in many cases, the physical materials required and the training aids available. This is a rigidly-structured program geared to the pages of the official shop steward's manual. Its purpose is to prepare the steward for his role in grievance activities and in union building.

**SOUTH CAROLINA**

Programs, utilizing this six-lesson format as a guide, have been held for training union stewards. However, as far as this writer could determine from interview, the programs are conducted only at infrequent intervals. Conversation with one steward revealed that a series of sessions, similar to the program described in the manual, had been scheduled by his union in South Carolina. The steward attended two Saturday morning

meetings and then quit. He understood there had been only one meeting after he stopped. The steward stated, "some guy from headquarters came down for the first meeting" and "a union trainer from somewhere was scheduled to run the other five sessions." He quit because, "I didn't hear anything I didn't already know." If true, the reason for his ceasing to attend appears to be valid.

## ALABAMA

Conversations between this writer and some of the business agents of local union affiliates in Alabama revealed that formal training programs are held from time to time. This time span was refined during a subsequent discussion to mean that occasionally, sometimes on a once-a-year basis, a formal school, of one-week's duration, was conducted. A shop steward training course could be requested from the state union organization.

None of the business agents interviewed had requested a steward's course during the past three years. One representative stated that he had enough new stewards in the local at the particular time to request a course and was about to do so. The business agents, as a group, exhibited very little enthusiasm for formal steward training. The general impression was that the business agents did not believe such programs were necessary.

## FLORIDA-GEORGIA

To ascertain the training being done by the state-level union organization, this writer contacted labor leaders in Florida and Georgia. In discussing the steward training problem with them, they stated that formal training courses are held and, while they may not be purely oriented toward the steward's problems and procedures, stewards are welcome and do attend. For example, in Florida, a formal "Summer Labor School" is held annually. The school lasts for five days. Stewards, business agents, and union officials at all levels are invited. Those individuals who have full-time jobs with an industrial concern have

their expenses defrayed by the union. In addition, the local union may also pay the company for which the steward works for the time he is away from his job.

The curriculum included such subjects as labor law, industrial relations, negotiations, politics, economics, etc. The training techniques included workshop sessions, lectures, discussions and role-playing.

## EDUCATION VS. TRAINING

The intent of this schooling appeared to be oriented toward "education," as opposed to "training." An additional indication of this educational approach, other than the inspection of course content which was conducted, was that the instructors are usually professional educators, who have a labor relations background.

This educationally-oriented approach is in consonance with a drive, in past years by the AFL-CIO leaders, to up-grade the educational background of its officials. There was considerable written material about this educational drive in trade publications, magazines, etc. One such article, indicative of the approach at that time, is referenced.<sup>4</sup>

Although highly commendable, these programs did very little to improve the performance of the shop steward in his industrial environment.

In an effort to meet both the educational and the training needs, there have been some combination education-training programs conducted for shop stewards. One reference to such a program noted:

A novel arrangement for training shop stewards was worked out . . . with the full cooperation of management. The training program consisted of a nine-week "grievance clinic" sponsored by the unions and conducted by the University of Illinois . . . Class discussions centered on the procedures for handling worker grievances under the labor-management agreement. Techniques for preventing grievances and for meeting the human relations problems which confront stewards were emphasized.<sup>5</sup>

In this program, and similar programs today, the basic emphasis was upon

training the steward in the grievance procedure and, in some measure, providing him with a better understanding of human motivations to help him solve such problems on the job.

As has been stated, there are training programs oriented toward improving the steward's performances. However, the performances these courses are designed to improve are the steward's effectiveness in handling grievances and in building the union. The research conducted did not disclose a single program designed to produce the knowledgeable, job-skilled steward depicted in Table I.

## THE STEWARD TRAINING CONCEPT

Training programs are often formulated by an orderly progression through the who, how, where, when and what question and answer stages. This section of this article is concerned solely with "what" the content of the new steward's training program should be.

One approach to formulating a program, the one employed here, is to begin with a job's individual specifications. Since training is normally directed toward individuals, the next logical step would be to check the individual's specifications against the job specifications, analyze the man's short-comings and train him accordingly. However, the basic program discussed in this study is a generic one, i.e., it is a broadly-defined concept that could be used to train stewards with no previous experience or those having considerable background. It has been assumed that man specifications would be equated to the job specifications to eliminate over-training and to make the training responsive to the specific needs of the stewards in their job environments.

This broad concept of the steward's course was developed from the job parameters depicted as the standardized job model in Table I.

## HUMAN RELATIONS

Group I of the table is entitled, "Personal Relations." Courses dealing with the theory and practice of human rela-

tions and human motivation should be the basis for this phase of the training. The orientation of such courses should emphasize the attitudes, approaches and techniques required for the steward to develop and maintain friendly working relationships with his industrial contacts. This human relations training should include discussions of the personality traits desired and required of an effective union steward. The value and benefits accruing to both the steward, personally, and his parent organization, the union, should be covered.

The depth of these presentations should be based on the background of the trainees. As one possible approach to developing course content, it might be desirable to promulgate a series of manuals starting at the approximate level of the "Training Within Industry Service" manuals<sup>6</sup> used during World War II and increasing them in sophistication until the proper level of training has been attained.

Group II, in Table I, shows the "Man-centered Factors" in the steward's job. Some of these factors would normally be discussed during the first phase of training, i.e., the exercise of authority and the utilization of personal leadership. The presence and role of each of these factors in the organization should be explored and clearly understood.

## COMMUNICATIONS

The up-grading of the steward's communicative skills would vary with the individuals involved. However, the fundamental considerations and techniques of effective communications should not be beyond the acquisitive skills of the average steward.

The steward's role as a worker should be discussed. It should be pointed out that the steward's elective position, the requirement to maintain friendly relations, and present a good image, all necessitate that he have the respect of his fellow workers and of management. Being a good worker is one way to achieve that respect.

The remaining "man-centered" factors are concerned with the steward's knowledge of his job and the contract provisions. A knowledge of the job requirements listed for the standardized job model in Table I will be necessary for the steward's effectiveness. Accordingly, these requirements, and the reasons they are valid parameters, should be made clear during the training program. The knowledge of the contract parameter should be required, since it is one base for the steward's effectiveness in the Category III D factors of Table I.

The preceding statement should not be taken to mean that the steward's effectiveness in job evaluation, safety, wages, promotions, etc., is to be measured by his vigor in pressing grievances arising from disputes. Efficient performance, utilizing the standardized job model concept, envisions effectiveness as being measured in terms of the steward's systematic efforts to prevent problems from arising, rather than in "grieving" past lapses of control. A knowledge of the contract by both the foreman and the steward should provide the foundation upon which the more positive aspects of labor relations, i.e., cooperative problem-prevention, can be based. The training conducted should reflect this spirit of cooperation.

A considerable amount of practical training will have to be carried out to educate the stewards in the eight factors listed under Category III D. Such things as job evaluations and wage and salary programs are often quite technical. Some of the other factors are less difficult to learn, but as a whole these factors will necessitate some time be spent in explaining them.

Category III B, "(the steward) makes contract recommendations to union officials," should require only a limited training time. A lecture might include suggestions for the steward's handling of the membership meeting, where contract recommendations often originate. Procedures for processing the recommendations could be discussed. In essence, the steward's role in this pro-

cess could be explored and developed.

The steward's effectiveness in presenting workers' grievances to management should reflect the cooperative philosophy previously mentioned. In taking this approach, this writer is neither forgetting nor denying the political nature of the steward's environment. This cooperative philosophy is the keystone to building the types of relationships that must exist for the steward to perform effectively. This is not meant to imply that harmony will automatically exist at all times between management and labor. Honest disagreements and differences in contract interpretations will still arise. However, their resolution should be as amicable as possible. Using the proper philosophical approach during steward training should help to make it so.

The last factor is morale. As one writer<sup>7</sup> noted, training tends to heighten morale, which, he points out, is one of the values of training. However, training stewards to become effective morale boosters is a different problem. It is, however, possible to instruct stewards regarding the components of morale<sup>8</sup> and to point out ways they may improve it. Their success will accrue dividends in terms of friendly relations with their peers.

The training program discussed consists, essentially, of a conceptual outline. From this outline, union officials and management training directors should be able to develop a program tailored to their specific requirements for improving the shop steward's performance. As a note of caution, it should be remembered that, although the levels of sophistication in the program may vary with the degree of steward efficiency attained, the failure to cover all of the model parameters may negate the value of the program.

## ADMINISTRATION AND COSTS

The administration of any training program is concerned with answering the who, how, where, and when questions, which were left unanswered in the pre-

ceding section of this article. In answering the "who" is to be trained, the requirement for a comprehensive program for shop stewards has been developed.

The "how" training to be conducted necessitates that the objectives of the program, including the cooperative philosophy approach, be clearly understood by the instructional personnel and reflected in their teachings. Therefore, the careful selection of instructors is a major administrative factor in the success of the program.

Since it is an essential element of the "how" answer, it should be stated that this training is conceived as being most efficiently accomplished as a joint union-management program. The rationale for this approach will be discussed later.

As to "where" the training should occur, this is a purely administrative decision based on the demand for the training and the availability of suitable facilities. Similarly, the time, duration and frequency, i.e., the "when" aspects, are routine administrative decisions based on pertinent data available.

No effort has been made to estimate the actual costs of this program, since they will vary with the magnitude of each program. If the program is presented as a joint union-management program, the costs should be shared.

One other cost factor should be mentioned. This is the cost of having ineffective shop stewards conducting their affairs in the plant. The effects of improving morale, efficiency and the psychological climate between union and management could pay considerable dividends in increased productivity, reduction in absenteeism, turnover, accidents, etc. Equating these intangible profits against the dollar outlay for training may show that a joint union-management steward training program is a highly profitable venture for all. The dividends may not be immediately noticeable but the long-range prospectus should indicate a most profitable future.

## **INTERESTS OF INDIVIDUALS**

One way to determine whether or not the steward training program outlined here might acquire the necessary union-management support is to consider the advantages that would accrue to the interested individuals. These interests can be divided into three sections.

### **THE STEWARD'S INTERESTS**

It may be assumed that, under normal circumstances, the union steward is interested in efficiently and effectively performing his job. What the job purports to be, and what it actually is, may not be too clear to him. To clarify this situation and to equip the steward with the required skills, formal training will be necessary.

The benefits a steward may derive from training are, as a minimum, all the benefits common to any training situation. These factors are discussed at length in existing literature, one of which is reference 9. However, the unique character of the steward's job markedly increases the benefits he may expect from formal training.

In noting his unique job, reference is made to the requirement for the steward to serve two masters, i.e., management in the production process, and the union, in a representative role. In such a situation, a jointly-presented training program can provide the factual data and orientation that the steward needs to perform his many tasks. The information acquired will permit him to make the immediate and long-range adjustments that his environment necessitates. The interviews with stewards showed they had a sincere interest in proper training. Too often, it appeared that the basis for much of the trouble between the union and management was the steward's lack of confidence in himself and lack of knowledge of his job. The proposed program could do much to alleviate both situations.

### **MANAGEMENT'S INTEREST**

Many aspects of industrial operations are of interest to management. For ex-

ample, there seems to be a belief among some managers that production, per se, should be the primary concern of management. This belief is translated into a criteria measurement, i.e., any programs that increase the quantity or quality of production are good and those proposals not directly affecting production are bad. Those who espouse these criteria should cheerfully support joint steward training, since improved industrial harmony can lead to increased productive efficiency.

This writer does not agree with those who consider production to be the primary concern of management. This function, especially with increased automation, has become repetitive and routine. The truly essential element confronting the manager today is the organizing, motivating and controlling of diverse groups working in a highly complex, interrelated functional environment. The issue to be considered is whether or not steward training can be a vital adjunct to management in directing its organizational elements and improving the efficiency of its functions. Since the presentation of a joint program would require union-management cooperation in the administrative and financial aspects, there would be, quite likely, improved relationships. And, when the conceptual viewpoint is considered, i.e., that the program should espouse the cooperative union-management philosophy, the probability for attaining improved interrelationships seems quite high.

Management has little to lose, other than administrative effort and its share of the training costs, by participating in joint steward training. The benefits, in many functional areas, as well as in profitability, could be significant.

### **THE UNION'S INTEREST**

The belief that "union is union and management is management and never the twain shall meet," implies that dual loyalty by the employee to both his company and his union is impossible. Commenting upon the fact that separ-

ated loyalty normally exists during the organizing phase of union-management relations, one author stated that:

As the union-management relationship develops, the parties are no longer sharply separated in their spheres of activity. In effect, it is union and management together who administer the social system of the plant, even in cases where there is a good deal of friction between them. Furthermore, the workers come to realize that many of the problems they face are not problems separating union from management but rather problems in which union and management agree that one group and not another will receive a given benefit.<sup>10</sup>

The author continues to develop the thesis that the organizational structure is an interlocking industrial relations system, jointly administered by management and union leaders.<sup>11</sup> This picture of cooperative industrial relations also negates the occasionally repeated premise that a union leader's existence depends on industrial strife.

The union has a vested interest in seeing that all of its officials, including front-line representatives, fully understand their duties and responsibilities and perform their tasks efficiently and effectively. Steward training now being conducted is not sufficient, in either scope or content, to equip the steward to do the job delineated in the standardized model. The proposed program will give the steward the required skills. It would appear to be in the best interests of the union to subscribe to such a program.

### PROGRAM RESPONSIBILITIES

The recommendation for a fully-integrated union-management steward training program has a precedent in the apprenticeship programs in industry. Such programs speak highly for the results from cooperative programs.

In writing of union-management cooperation, one author stated that:

Union-management cooperative plans extend beyond usual collective bargaining. They assume collective bargaining, but, in addition, the union and the employer create and maintain a positive, planned cooperative program designed to increase efficiency, productivity, and teamwork, to give greater security to the union and added advantages to its members.

Union-management cooperation has many

variations. Cooperation of employers and unions may approach full partnership. In most cases, however, it is restricted to the attainment of one or more stipulated objectives.<sup>12</sup>

The "stipulated objectives" of this training program have been stated. The overall responsibility should be a joint one. A situation where the responsibilities were not shared would violate the basic cooperative spirit philosophy, which is the keynote of the steward's improved relations program.

### INSTRUCTION SEGMENTS

As a practical matter, the instruction might be segmented into a system where the union would instruct such background topics as the functions of the shop stewards, grievance processing, labor legislation and collective bargaining, for example. Management could give instruction relative to the factors listed in Category III D of Table I, i.e., job evaluation, safety, wages, promotions and similar subjects. In addition, management should provide information on policies and procedures of directing and controlling the company and should instruct stewards in intra-company communications.

Some areas in the training program should be presented by independent instructors. These would be experts in human relations and personal development.

The course content, selection of instructors and similar administrative details should be undertaken by a joint union-management committee whose responsibility is the presentation of the program. The size of the committee is of no great significance as long as it is composed of an equal number of union and management members.

The key note of this committee must be that all members, regardless of affiliation, deal with each other in good faith, to present the kind of program envisioned in this study. All training sessions should be open to committee members and to representatives from both the union and management.

The jointly-sponsored program has

much to offer all concerned. Proper administration should provide the benefits desired.

### ATTITUDE PROBLEMS

If the physical obstacles in achieving industrial harmony are surmountable, which they are, it would appear that only the psychological objections and vested interests of individuals in both union and management would prevent the attainment of this worthy goal. The implication that such personal attitudes should not be permitted to block this progressive step is inescapable.

This program presents a challenge to management, from the foreman to the top executive officer in the company, to work with the union in clarifying and vastly improving an unsatisfactory industrial situation. Similarly, the union, from the steward to the top of its hierarchical ladder, faces the same challenge to work with management in this matter.

The challenge to the steward is one of self-improvement through the assimilation of training and the practice of that instruction in the conduct of his job. As his effectiveness increases, so will his importance to both the union and management.

This program offers no particular challenge to the production worker. However, as a result of the increased effectiveness of the steward, the worker may benefit by being a member of an enlightened, more cohesive, stronger work force. The stability found in such environments may result in his becoming a more efficient, productive worker. Therefore, while there is no direct motivation in this program for the individual worker, he may benefit, both directly and indirectly, from the steward training.

### POTENTIAL BENEFITS

Based on the information developed from the research, it appears that the program's goals are both attainable and strongly needed. The costs should not be prohibitive and the potential benefits

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are large. The losses, if they can be considered as losses, will occur primarily within the mental concepts individuals have of their particular role and in their concepts of the prerogatives they possess in their organization. The loss of a particular individual's status may prove to be an insignificant factor when measured against the possible organizational benefits from an improved industrial situation.

Progress in this facet of industrial relations may not be entirely painless but it will not be excessive in either tangible or intangible costs. The union steward is a very frail individual to be carrying the responsibilities thrust upon him. The least that should be done for him is to give him an understanding of the size of

the load he is expected to bear and to tell him how the weight can be balanced and carried. With effective assistance and advice, the steward may prove to be a far better "burden-bearer" than our organizations have previously known.

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