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Individual in the Labour Market Research Group

Organising the Future: Report on the USDAW Organising Academy case study

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Headlines:

- The USDAW Organising Academy is extremely successful in terms of membership growth. This suggests that an institutional commitment to strategic organising can result in significant growth in membership despite competitive labour and product markets, high labour turnover and a workforce which lacks scarce skills in the labour market.
- The Organising Academy provides significant opportunities for the personal development of USDAW's reps, benefiting both the union, by providing more skilled reps, and the individual reps, whose opportunities are, potentially, widened both in the labour movement and beyond by the transferable skills which they gain.
- However, the strong institutional focus upon membership growth has a negative trade-off with regards to the sustainability of this impressive growth. Specifically, suboptimal levels of workplace representation structures are limiting the effective servicing of this growth in membership.
- This poses a number of risks: a passive membership culture whereby the union is seen as 'insurance'; inefficient utilisation of expensive officer time; increasing costs of legal services; a widening potential for lawsuits to be brought against the union.
- A number of changes are suggested that would strengthen USDAW's 'organising' activities which are identified as distinct but complementary to USDAW's very successful 'recruiting' activities.

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USDAW

The Union of Shop and Distribution and Allied Workers (USDAW) has over 432,000 membersⁱ primarily in retail but also with significant membership in warehousing and distribution and food packaging. USDAW operates in an environment marked by high labour turnover, which results in the union having to recruit up to 30 per cent of its membership every year just to stand stillⁱⁱ. The requirement to recruit such large numbers of new members has led USDAW to be a major proponent of organising. First this took the form of sponsoring participants on the TUC Organising Academy from 1998 until 2002 and then from 2003 onwards through the development of its own Organising Academy. This can accommodate far larger numbers of organisers as well as enabling more retail environment specific training and ensuring ‘like-for-like recruitment’ⁱⁱⁱ. A ‘Partnership’ strategy is utilised in order to ensure employers grant organisers access to potential members in workplaces with existing union recognition and the Academy tends to focus upon what is known as ‘infill organising’ as opposed to ‘greenfield organising’ in workplaces without recognition.^{iv} In 2012 USDAW seconded 69 reps for 6 months to take part in its Organising Academy 1 and a further 35 to take part in its higher level Organising Academy 2. These organisers recruited over 11,000 new members.

Evaluating union organising

Academic evaluations of union organising have tended to use “whatever objectives unions have set themselves and not dealt with the question of what organising is and what it is for”, and organising has become “so flexible that it can mean almost anything to anyone.”^v Simms identifies sustainability as the key objective to be evaluated when accounting for the successfulness of ‘greenfield organising’^{vi}. That sustainability must also be central to any evaluation of the ‘infill organising’ undertaken by USDAW Academy organisers is self-evident. In fact, sustainability allows ‘organising’ activities to be differentiated from the related but distinct concept of ‘recruiting’ activities. Recruiting can be understood as activities ‘which aim to increase membership levels’, such as: mapping workplaces and ranking the propensity of non-members to join, encouraging person-to-person recruitment, emphasising the ‘like-recruits-like principle’ and raising the union profile in the workplace through surveys and campaigns. Conversely, organising can be understood as ‘activities which aim to develop organisational structures and cultures which will *maintain* membership levels’, such as building workplace representation structures and lay organising committees, developing members collective ability to deal with issues and empowering them to do so and encouraging higher levels of workplace union activity through grievance based recruitment and campaigning. Though recruiting and organising typically go hand in hand, they are nonetheless distinct and it is possible to do one without the other. Indeed it will be argued that recruiting and organising can come into conflict. Therefore, the success of USDAW’s Organising Academy cannot be evaluated in terms of membership growth alone, an analysis of the development of organisational structures and cultures which enable this growth to be sustainable must equally be undertaken.

Methods

Throughout 2012, 39 semi-structured interviews, including some follow up interviews, were conducted with two senior USDAW officials, eight USDAW officers, ten USDAW organisers, nine USDAW reps and ten USDAW members. Additionally, 3 days of Academy training, 5 days of Academy

organising, 3 team meetings and a branch meeting were observed. Workers interviewed or met during the observation of union activities were asked to fill in surveys, resulting in 29 completed surveys. This amounted to a total of 46 participants. The researcher also undertook 2 months of participant observation at a retail store, located in a region where the union had over 60 per cent density with the employer.

Developing Organisers

The Organising Academy provides significant opportunities for the personal development of USDAW reps, increasing their confidence, personal organisational skills, written and verbal communication skills, knowledge of the labour movement and employment law and practical experience of a variety of 'organising tools' such as store mapping, surveys and targeted campaigns. The opportunity to learn from other organisers on the academy was also important especially through mixing with reps with significantly different experiences such as being from stores with different formats or workforce ethnic makeups. This benefits the union by providing higher skilled reps, and also, through the development of transferable skills, benefits the individual reps by opening their horizons to new opportunities in the labour movement and beyond.

Organising vs. Recruiting

The Organising Academy is clearly very successful in terms of recruiting and USDAW's leadership and officers are committed to this recruitment being delivered through activities which also accomplish organising aims. Yet, a conflict exists between the realisation of recruiting and organising aims and this has a number of negative impacts on the development of organisational structures and cultures. This in turn limits the sustainability of the impressive membership growth. In particular, inadequate representation structures in the workplace were raised by many officers as placing a major barrier upon their ability to effectively recruit, service, develop reps and campaign, and that, in time, this would place a barrier upon future growth as well as weaken the union's workplace efficacy.

Recruitment targets

The leadership and officers demonstrated an awareness of the importance of developing reps for ensuring the sustainability of recruitment, and a commitment to improve support for reps in order to reduce their turnover. However, the ability of organisers to identify and develop reps was hindered by a prevalent perception that their performance was largely judged by the numbers of new members they individually recruited. The view was especially emphasised with regards to the perception of the selection process for progression from Academy 1 to Academy 2. Some organisers explained that, though they focused on identifying reps whilst recruiting, in doing so they believed themselves to be going against the wishes of the union. This view was also maintained by some officers who had gone through the Academy themselves.

The organisers and officers explained that there was no direct pressure from above to focus on recruitment and that the targets were flexible depending on other activities undertaken by organisers, such as the development of reps. Still, some officers felt that organisers were being given mixed messages due to the existence of recruitment targets, which created a competitive environment. This was despite the officers encouraging organisers to develop reps as well as recruit.

Many organisers, for their part, simply did not believe both officers' and senior officials' assertions that they would not be negatively appraised if they did not focus solely on recruiting large numbers of new members. This even meant that some organisers avoided workplaces and situations in which they were less practiced at recruiting, and did not support workplaces where there was little room for further membership growth. Academy 2 was seen as focusing more on developing reps, but many of the officers who had attended it felt that this was also either recruitment focused or becoming more so as it grew in numbers.

Passive engagement: 'the union as insurance'

A heavy focus on recruitment led organisers to sell the union as a service which individuals can utilise rather than encouraging people to become active in their workplace so as to collectively improve their situation. This can most clearly be seen in the fact that when organisers were recruiting, a phrase along the lines of "the union is like insurance" was often employed. When asked about this the organisers were aware that officials did not want them to use the phrase but showed a lack of understanding as to why, thinking it was more to do with coming across as sales people rather than there being a problem with framing the union as being an individual, passive and reactive relationship. This framing of the union adds to the imbalance in representation structures, created by a focus on recruiting over organising, by additionally emphasising an internal culture in which members hold an expectation of a high quality service as a right, without a requirement that they themselves be active in the union.

Risks of insufficient organising relative to recruiting

An insufficient focus upon developing organisational structures and cultures which facilitate the servicing of members through workplace activism, most importantly the rep function, presents a number of risks. Firstly, it requires officers to have an ever-increasing portfolio of members which they have a responsibility to support. Officers are expensive and they also comprise many of the union's most skilled organisers. Therefore, increasingly, representation-heavy workloads do not represent an efficient allocation of union resources. Some officers suggested that the burden of representations was limiting their ability to recruit, develop reps and campaign effectively while others suggested that quantity of representations was risking officer burnout.

Insufficient representation structures and a cultural expectation of union membership being a passive and insurance-like relationship also increases members' need for, and expectation of, access to legal services. However, due to the low cost of membership relative to the high cost of legal services, it is inevitable that USDAW can only take on cases with "reasonable prospects of success."^{vii} Yet, the vast majority of cases are likely to be unsuccessful, including those most important for a union such as breaches of Employment Law. Only one in six cases referred to Employment Tribunals are successful. Therefore, the majority of cases must be rejected no matter how aggrieved the member is. This inability to pursue legal action on the behalf of members may damage perceptions of the effectiveness of the union amongst the workforce. Moreover, the same financial constraints do not exist for high street solicitors, and thus inevitably the union will have to reject some claims that a high street solicitor may have taken. This opens the union up to potential lawsuits from members whose claims are deemed as not having a "reasonable prospect of success", but which are then taken up and won by high street solicitors.^{viii}

Organiser representations

Organisers are not allowed to carry out representations whilst on the Academy unless they receive special dispensation from a senior union official. This was to ensure that organisers' time on the Academy was spent organising rather than taking on the representation workload of the officers supporting them. Many organisers agreed that their workload would not permit them to do many representations, despite it being something they enjoyed. Nonetheless, this was an issue of significant animosity, especially when the organisers felt that their own stores were not being sufficiently supported in their absence. Many organisers also admitted to having broken the rules and carried out representations, whilst many officers also admitted to having asked their organisers to carry out representations. The present attempt to enforce a ban can also be damaging to the organiser-union relationship of trust. For example, after failing to convince organisers of the benefits of not carrying out representations, one official informed them that if they were to carry out representations whilst registered as organisers, they would be breaking the law. For some organisers this was seen as a deliberate attempt by a union official to misinform them.

Issue based campaigning

A recurrent feeling amongst officers and organisers was that the campaigns which the union encourages nationally do not deal with the key issues in the workplace, such as the problems caused by flexible scheduling. Organisers are taught 'issue based campaigning' but do not generally practice it. Previous organising research has highlighted the use of workplace grievances as the basis of recruitment to be an effective method of achieving sustainable recruitment.^{ix} According to such an approach organisers should identify major issues in workplaces and seek to engage the workforce in participating in campaigns on these issues. This, hopefully, encourages an internal culture amongst the workforce whereby they see their relationship with the union as an active one. It also provides the necessary motivation and empowerment for greater numbers of members to take on rep roles, while being an effective way to recruit new members too. Doing so within the constraints of a partnership strategy does present a challenge, but one that should, due to the evidence of its potential utility, be given some consideration.

Recommendations

This leads to a number of suggestions for how the USDAW Organising Academy could be improved to ensure the sustainability of its successful recruitment of new members:

- Communications with organisers should place less emphasis on recruitment targets and it should be made clear that recruitment is not a criteria for selection to Academy 2.
- The identification and development of reps should be emphasised more in the evaluation of organisers.
- Members recruited by reps who have been developed by an organiser on Academy 1 should be included in their monitoring as is the case with Academy 2.
- Greater use should be made of 'issue based campaigning' to encourage an active membership culture, and motivate and empower greater numbers of members to take on rep roles.

- The reality is that organisers are likely to carry out representations regardless of whether they are banned from doing so. The Academy should, therefore, include a limited element of organiser provided representation training. This would increase the number of competent reps, reduce officer workloads and provide experience to organisers of how to train others. It would also increase the challenge and enjoyment of the Academy and ensure peace of mind that the organisers' own workplaces are being serviced while they are absent.
- On completion of the Academy, all organisers should return to their workplace so as to put into practice the organising skills which they have learnt and increase the number of well organised workplaces. Only after achieving this should they come out of their workplace on 'stand down'. At present many organisers, especially the most skilled, do not return to their stores but go on 'stand-down' where they primarily undertake recruitment activities and thus only practice the recruitment skills which they have learnt rather than the organising skills.

References

ⁱ <http://www.usdaw.org.uk/aboutus.aspx>

ⁱⁱ Simms, M (Forthcoming). Accounting for Greenfield Union Organising Outcomes. *British Journal of Industrial Relations*

ⁱⁱⁱ Simms, M., Holgate, J., Heery, E., 2012. *Union Voices: Tactics and Tensions in UK Organizing*. Cornell University Press.

^{iv} Simms, M (Forthcoming). Accounting for Greenfield Union Organising Outcomes. *British Journal of Industrial Relations*

^v Simms, M. and Holgate, J. (2010). Organising for what? Where is the debate on the politics of organising. *Work Employment and Society*. 24(1): 157-168.

^{vi} Simms, M (Forthcoming). Accounting for Greenfield Union Organising Outcomes. *British Journal of Industrial Relations*

^{vii} Legal Plus USDAW Union Members Hand Book

^{viii} Renton, D., 2012. *Struck Out: Why Employment Tribunals Fail Workers and What Can be Done*. Pluto Press.

^{ix} Simms, M., Holgate, J., Heery, E., 2012. *Union Voices: Tactics and Tensions in UK Organizing*. Cornell University Press.