



YOUR TURN 2 **New Insights into Union Renewal**

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EUROPEAN TRADE UNION COMMITTEE FOR EDUCATION

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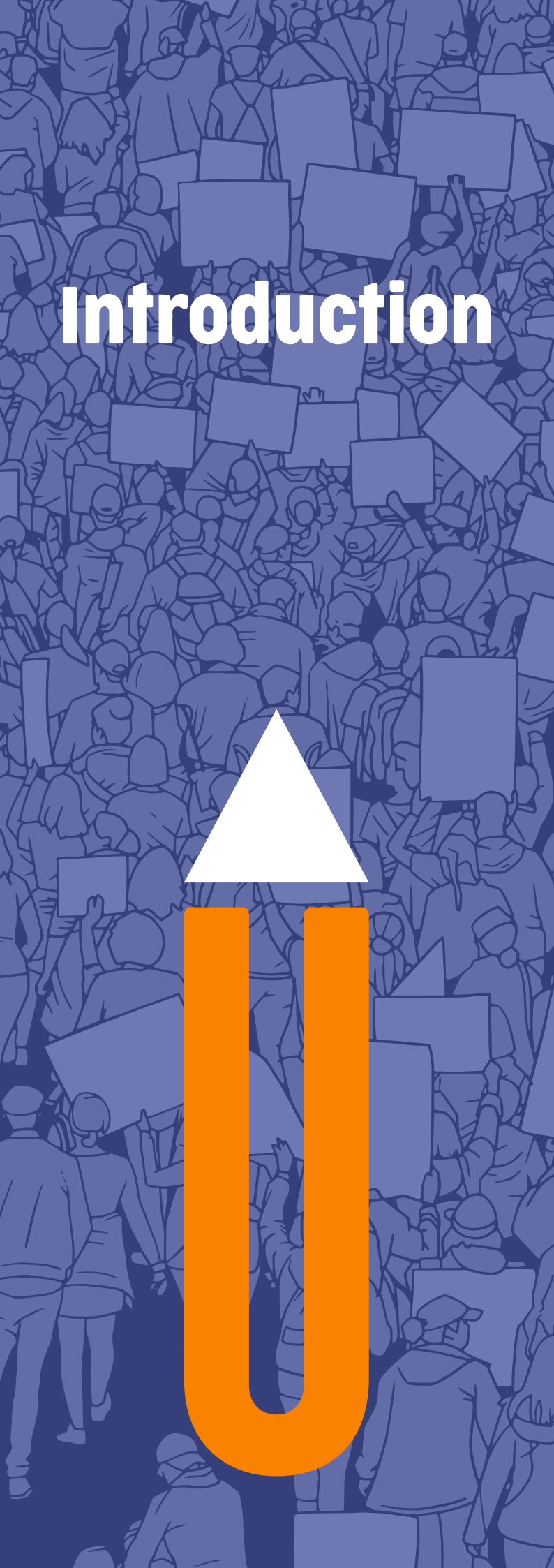


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Introduction

Trade unions exist for many reasons, and can have diverse objectives. These objectives are determined by union members through agreed democratic structures. However, whatever the goals, the common theme that unites trade unions is their commitment to bring about change.

The capacity of unions to make change happen depends in large part on their ability to mobilise the collective power that resides in the union's membership to create a movement for change. However, unions' ability to mobilise this power has often been diminished in recent years. In some cases this is explained by long term societal trends that have fragmented collective identities, while other explanations focus on the intentional acts of employers and governments who have sought to marginalise trade union influence and make collective organising by workers more difficult. Multiple factors are at play, working in complex and interdependent ways.

Union renewal is the process of consciously confronting these developments and taking the strategic decisions and actions that seek to rebuild union power. It does so by seeking to activate a union's most valuable resource – the power that resides in the workforce (both union members, and those who are not yet union members). It recognises the profound challenges that confront the education trade union movement, but it is rooted in the optimism that change is not only necessary, but possible. It echoes the sentiments of a teacher and union representative who observed, when reflecting on her experiences in her school:

*If you can organise my school,
you can organise anywhere.¹*

The challenge is to find a way to make change happen.

1 Quoted in Little, G., Sharp, E., Stevenson, H. and Wilson, D. (2023) *Lessons in Organising: What Trade Unionists can Learn from the War on Teachers*. Pluto Press.

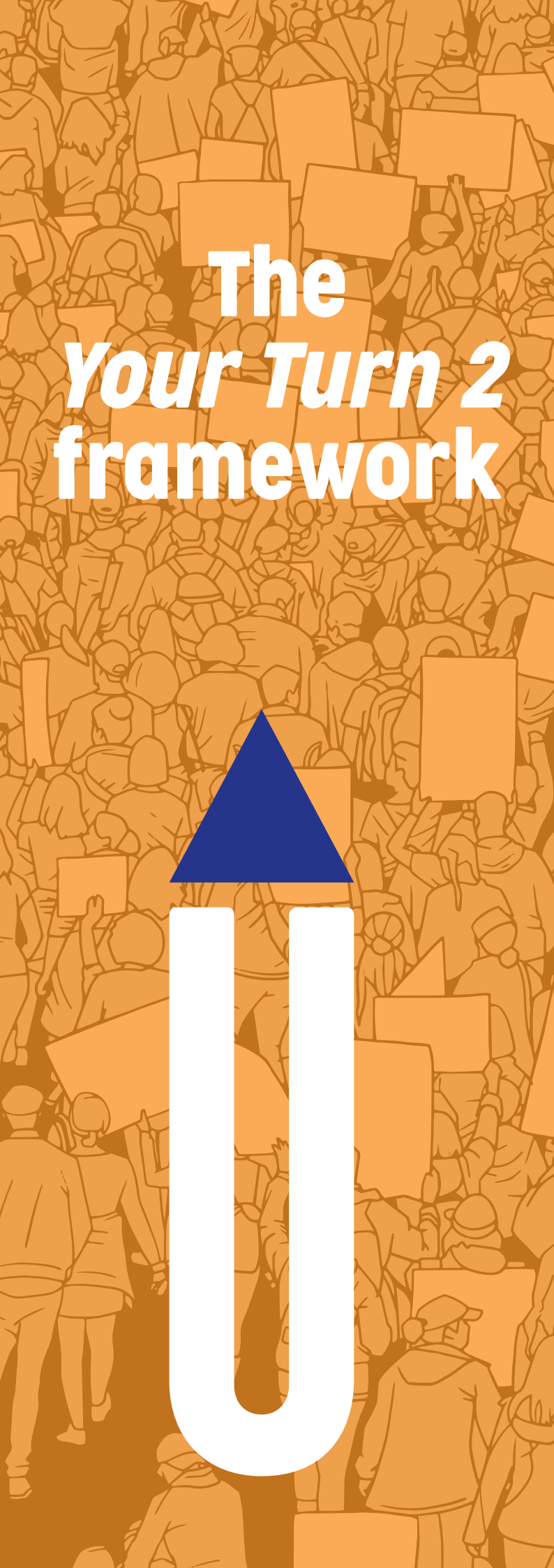
In this report we build on an earlier study, *Your Turn 1*, as we focus on the need to build leadership capacity in education trade unions. However, our concern is not narrowly focused on those traditionally considered as ‘leaders’, but rather our interest is in developing leadership capacities more widely – those practices that build the union power that makes change happen. That is why we refer to the leadership we are interested in as ‘transformative leadership’ – because we recognise that change happens at multiple levels. Achieving change for members requires unions, and union members, to change too.

Specifically, our focus is on developing forms of leadership that are close to union members in their workplaces. We refer to this as ‘link leadership’ because of the critical role it plays in bonding workers to the union organisation. It builds union power by focusing on the point of connection between the union’s activist core (those union members who ensure the union functions every day) and its wider membership (who are typically more removed and engaged less frequently). It seeks to make this connection a source of strength, rather than a point of weakness. We do not claim that link leadership is intrinsically new – in many ways it builds on existing practices and well-established research. However, we do suggest that link leadership offers novel ways of thinking about how it is possible to build union power and drive positive change. In this report we describe what we mean by link leadership and what forms it can take in different contexts. We explain why it is crucial to union renewal, and how it might be developed by the intentional and strategic actions of those already involved in the union.

The report provides a *Your Turn 2* framework for thinking about link leadership, alongside a set of practical actions that can make a positive contribution to developing this type of leadership.

The ideas that are presented are the outcomes of the *Your Turn 2* project, designed as a collective endeavour involving

researchers, the project’s Advisory Group and participants in the project’s workshops. It also reflects findings based on six short case studies from individual unions. As such, project outcomes are the result of a process of co-construction in which ideas developed over time from the dialogue that all project actors engaged in. For example, in early discussions, project participants used the terms ‘key local leader’ and ‘local leader’ to describe what we now call ‘link leadership’. As the discussion developed it was felt the term link leadership was able to capture more accurately the phenomenon we are describing. However, reflecting this dialogue over time, all these terms are used at different points in this report. Details of the project process are described in Appendix 1: *Project Methodology*. Appendix 2 provides a conceptual map which sets out the key ideas that inform the *Your Turn 2* framework. This allows any interested reader to explore the underpinning ideas in more detail, and to consult relevant references. Appendix 3 details the six case studies which provide examples of link leadership in practice.



The *Your Turn 2* framework

Building union power through transformative leadership

Here we present the *Your Turn 2* framework. It is the extension of work that was originally presented in *Your Turn 1* with its focus on ‘building at the base’, and can be considered as a sharpening of some of the key aspects of the initial framework. The research and ideas that underpin the work are set out in the full report in the form of a conceptual mapping. This provides sources that can act as further reading for anyone wishing to explore the ideas in more detail.

This is a framework – not a model. A framework is a set of ideas that allows us to think how we approach a problem. It is meant to be flexible – and capable of being adapted to often diverse contexts. A model suggests a plan to be followed or a template to be applied. What we present here is definitely not that. We are sceptical that such models have utility in diverse contexts.

Here we present the framework as a set of foundational assumptions accompanied by three key propositions. Each proposition has an associated consequential claim.

Foundational assumptions

Trade unions may have diverse aims and objectives, dependent on a range of contextual factors. It would not be appropriate for us as researchers to offer any opinion on the different policy positions presented by, and within, education trade unions. That is for a union’s members to determine. However, our view is that the one issue that is common to every trade union, is a commitment to achieve change in some form. Trade unions exist to secure

improvements and advancements, howsoever defined. That requires a challenge to the *status quo*.

Commonly the changes that are in union members' interests are not seen by employers as in their interests. There is therefore a conflict over interests and trade unions will only be able to influence the outcome of that conflict if unions are able to shift the balance of power between employers and unions in favour of the union. The challenge for the union therefore is to always seek to *build union power*. Whatever the starting position, there is always an imperative to build and renew union power. Without conscious, strategic effort to constantly build union power, in a changing world and over time, trade unions atrophy and union power declines.

Union power is impacted by many factors, not all of which are readily influenced by the union. In this study our concern is on building union power by focusing on the two sources of union power that the union can control, in part at least. Firstly, the union can grow membership by converting workers into union members, and secondly it can strengthen its membership by building member commitment, measured ultimately by members' willingness to take collective action with other union members to achieve agreed union demands. Typically, this power is *latent power*. It resides in the workforce, but it is not 'live' as many workers may be quite passive in relation to workplace issues, even when working conditions are a source of dissatisfaction. The challenge for the union, or more accurately those who are active in it, is to activate this latent power and in this report we refer to 'organising' as a specific type of union leadership that seeks to draw this latent power into the union and energise it. Where successful it holds out the possibility of tipping the balance of power between employers and workers in favour of the latter. We acknowledge that unions can amplify the power they have by developing alliances with forces beyond the union itself. This is

unquestionably important work, but this report deliberately focuses on building power at the workplace, not least because this is the foundational power that provides the base for the wider construction of alliances.

Change is therefore the core concern for all unions, and this framework provides ideas for thinking about change in union contexts. In this study we identify anyone who drives these change processes as being a leader – regardless of their 'level' in the trade union hierarchy, and regardless of whether they hold a formal union position or not. In this sense we are more concerned with 'leadership' (as a set of collective capacities), than narrowly with leaders (as individuals in a hierarchy). Specifically, we refer to 'transformative leadership' because we recognise that the change we are talking about has to take place at multiple levels and in many forms:

- Societal change – changing the wider environment that frames the context within which workers undertake their work.
- Workplace change – changing the terms and conditions in which workers exchange their labour with their employer.
- Trade union change – changing the organisation to build the power to advance the collective interests of members.
- Worker change – changing thinking so that workers recognise their shared interests in achieving change, and their own capacity to work with others to make change happen.

Here we provide a definition of transformative leadership that informs this study:

Transformative leadership involves acting with intentionality to make change happen that could not happen if an individual acted alone. It is change that requires collective action. Transformative leadership is grounded in union values and is always driven by a purpose. It identifies and uses the agency available to navigate prevailing conditions and it actively builds union power to make change happen.

This vision of transformative leadership is underpinned by three key propositions. Each proposition has an associated consequential claim.

- Transformative leadership is a practice not a position.
- Transformative leadership is strategic, educative and relational.
- The transformative leadership that matters most is the leadership closest to the members – link leadership.

1. Transformative leadership is a practice not a position

Leadership is intentional activity undertaken to make change happen – whatever that change may be. This approach to leadership places the focus on the actions of all those engaged in making change happen, and not just on those formally identified as occupying roles as ‘leaders’. Senior leaders in trade union organisations are key individuals, and they have a critical role to play in building union power, but our principal focus is on the actions of anyone engaged in leadership, defined as engaging others in building a collective movement for change.

Conceived in this way, leadership must, by definition, be distributed. It does not exist only in a hierarchical form but is found throughout the union – at national, regional, local and workplace level. Because leadership is exercised at all levels of the organisation it is also, by definition, collective. It clearly depends on the actions of individual union members, but its potential can only be realised when individual activities combine to create a collective capacity for change.

In this study we highlight ‘organising’ as a specific type of leadership engaged in building union power among workers (those who are union members, and those who are not yet union members). Organising is a verb – it refers to the actions of those engaged in activating the latent power that resides in the workforce.

Associated consequential claim:

- ‘Leadership’ does not exist in an inert form. It is not something that is fixed-sum and pre-determined. It is not invested in some individuals and not others. As a set of social practices enacted by members across a union, leadership can be developed. It can be expanded. Those with the potential to exercise leadership can, and must, be nurtured and supported. Transformative leadership is self-renewing as effective leaders always develop leadership capacity in others.

2. Transformative leadership is strategic, educative and relational

A focus on ‘leadership’ requires us to be explicit about the actions and behaviours that are central to our understanding of what leadership means. In this study we identify three leadership ‘capacities’ that are at the core of a leadership that is transformative.

Strategic leadership – the ability to combine values and purposes with a plan capable of making change happen. Transformative leadership always exists for a purpose – it is about making change happen that brings about improvements, material and ideational, for members or service users. Strategic leadership is able to formulate a plan that helps navigate prevailing conditions (favourable and unfavourable) in order to secure organisational objectives. Strategic leadership has both an ‘external’ and ‘internal’ element. An external focus is on the key campaigns the union seeks to win, while an internal focus is on the organisational changes necessary to build the power that can achieve campaign success. Both are intimately connected. Strategic leadership typically involves making difficult decisions (for example, in relation to resource allocation), but it also requires courage as any struggle over contested interests requires a willingness to be defiant.

Educative leadership – recognises that union power resides in collective action, but that to change how workers act, it is necessary to change how they think. Thought precedes action even if the two exist in a dialectical relationship. Transforming the thinking of others through deliberate intervention is what we mean by educative leadership – it is fundamentally pedagogical. Such leadership assumes many forms, but three particular aspects are highlighted. First, educative leadership involves the ability to formulate, articulate and communicate compelling narratives for change. These appeal to workers’ ideational interests (beliefs and values) as well as their material interests.

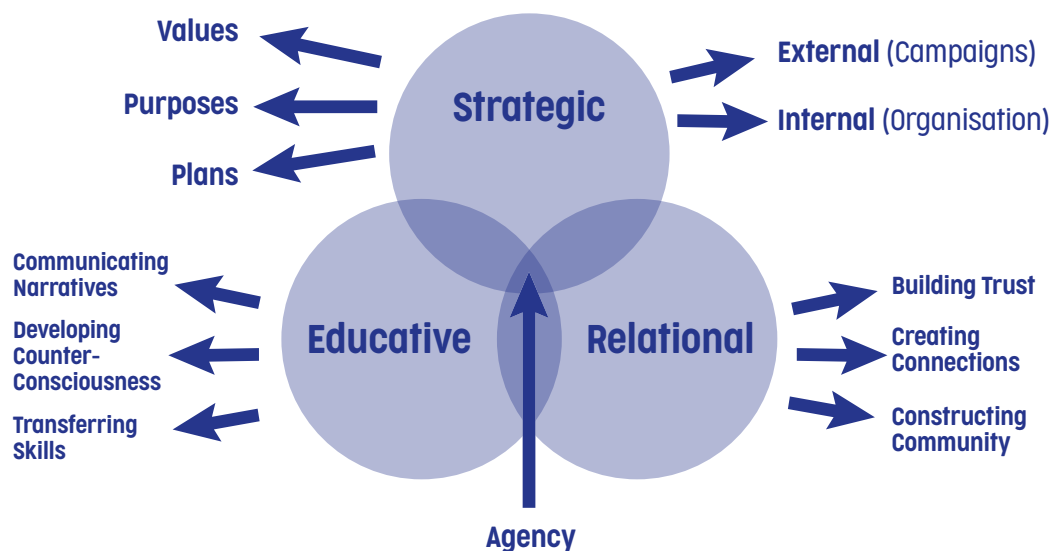
Educative leadership involves actively winning support for any proposed change. Second, it involves working with fellow workers to challenge the ‘common sense’ that normalises everyday inequalities and injustices while rejecting the notion that ‘there is no alternative’ and that change is not possible. Educative leadership works to explain current injustices, articulate realisable

alternatives and communicate a vision of how collective action can bring about change. It develops a ‘counter-consciousness’ rooted in trade union values and purposes that stands at odds to the every day ‘common sense’ people experience in their daily lives. Finally, educative leadership develops the practical skills in others that help to build leadership capacities more widely. From formal training, to informal mentoring (and everything in between), educative leaders are involved in building leadership in others.

Relational leadership – builds union power by strengthening the human connections between workers, as the basis for developing a union identity grounded in principles of mutual support and solidarity. Relational leadership is person-centred and draws on a wide range of interpersonal skills to create human connection and cultures of solidarity. Above all, relational leadership builds trust that can be described as forming the glue that bonds members to the union. Union power often relies heavily on the informal networks of workers that exist in workplaces having a union-orientation. Relational leaders are able to centre this union orientation in workplace groups and connect informal workplace based networks to the union. At its most effective it deepens union democracy by connecting the informal democracy of workgroups in the workplace with the more formal democracy of the union’s democratic structures. Relational leadership constructs community based on a sense of shared interests and solidarity. Nurturing and building these relationships often requires a sophisticated set of interpersonal skills to be exercised by the leader.

A summary of these ideas is presented below:

YOUR TURN 2 Leadership Capacities



Associated consequential claim:

- Building union power requires the development of strategic, educative and relational leadership capacities, at all levels of the union – from the national Executive Board, to the individual workplace. They are all interdependent and one capacity cannot be completely uncoupled from another. However, while transformative collective leadership requires the organisation to be able to demonstrate all these capacities not every individual leader needs to be simultaneously strategic, educative and relational.

3. The transformative leadership that matters most is the leadership closest to the members – link leadership

Transformative leadership needs to be evident at all levels of the union. Leadership is not something that exists only at ‘the top’ and that needs to be transmitted downwards. Rather it must exist at all levels. However, our argument is that the most important leadership that exists within the union is the leadership that is closest to the members. Posed simply, when a worker ‘sees’ the union – who, or what, do they see? A figure on the TV news? An email message in an inbox? An occasional visit from an official they do not know? Or a colleague who they know personally and trust?

The union is stronger when there is a union presence in the workplace – someone who represents the union (formally, but maybe informally) and who makes the union real to the worker. Who this person is will look different in different contexts – different unions, different education sectors, different

countries mean there is no single role, or position, that represents this person in every context. We have avoided using any title that works in one context, but does not work in another.

In this study we call this person the **'link leader'** because they are the union representative who literally connects members and the union. The 'frontier' between the union and members is not separate and remote, but porous and integrated. In earlier stages of the project we referred to this person as the 'key local leader' or 'local leader', and these terms are used at different points in this report. They all refer to the same phenomenon.

Although 'link leadership' may look different in different contexts we identify three 'dimensions' of link leadership that are not context specific will determine the nature of the connection – put simply, whether the link is stronger, or weaker.

- Proximity (length) – distance matters. The closer the link leader is to their colleagues the stronger the connection is likely to be. A remote link is likely to be a weak link.
- Activity (breadth) – what does the link leader do? What is the range of actions they feel confident to undertake? If the link leader's role is narrow, perhaps little more than passing on union post to members, then union presence will have limited impact. However, if the link leader is able to organise and represent members (to the union, to the local management) their role is amplified. Members do not just 'see' the union – but they see the union make a difference in their workplace. They experience their own power and agency at work.
- Relationships (depth) – educative leadership, the ability to bring about action by changing thinking, depends on strong, trusted and deep

relationships. It also depends on the ability to engage in dialogue. Where link leaders have established high levels of trust they are able to build the connections that are the basis for a strong collective identity. They are able to have the direct conversations with colleagues that can shift thinking and turn passivity into action.

Strong link leadership deepens union democracy by creating workplace cultures where workers recognise their shared interests, and who are more likely to participate in union structures and actions. Link leadership breathes life into democratic structures that can sometimes seem distant and irrelevant.

Associated consequential claim:

- Building union power involves building at the base. There is no short cut. The most effective way to build union power is to build 'link leadership' – those local union leaders who are the connection between the local union's activist core (the people who keep the union running every day) and the wider membership (those workers who are the real source of union power but who typically have only limited engagement with the union). Developing link leadership draws activists and members closer. It simultaneously builds union power and deepens union democracy. The key strategic role of a union's organisational leadership is to consider how it constantly develops 'link leadership' – not only by recruiting link leaders, but by supporting and developing them so that their impact is maximised. This contributes directly to building union power in the immediate, but in the longer term it is also likely to develop the pipeline of local activists who take on leadership roles elsewhere in the union organisation. It is the key to union renewal.



Practical actions to support union renewal

The following actions draw on published research, the outcomes of Your Turn 2 workshop discussions in Barcelona and Utrecht and examples from the six case studies presented in this report.

Union renewal through building link leadership – the need for strategy

If unions are to adopt an approach to union renewal that focuses on building link leadership then it is essential to adopt a strategic approach. A commitment to such an approach needs to be part of a coherent and appropriately resourced long-term plan.

At the heart of the plan is a clear vision about the project's purpose. Each union has its own unique context – what is the link leadership that needs to be developed? What does it, or will it, look like? Does it already exist in the union and need strengthening? Or is it necessary to re-think what link leadership can and should look like? Does something new need to be developed?

The scale of the organisational change should not be underestimated. Structural change will be required but renewal typically requires cultural change too. It will be essential to secure an understanding of the project across the union. Winning support for the changes required is likely to be an on-going endeavour. There will be resistance to change and at times it will be necessary to make difficult decisions. For example, longer term objectives may need to be prioritised over what present as immediate demands and challenges. Established ways of working may need to be revised.

In all these endeavours it is important to locate the need for renewal in the wider context of the union's purpose – to bring

about change that improves the working lives of members. Union renewal is not something undertaken as an end in itself, but as a project that builds union power in order to win for workers. Union renewal cannot be disconnected from the struggles for improved working conditions, but is integral to them. Building link leadership is not a technical process without a context, but a dynamic activity that is driven by the desire for change. Building the union in an abstract sense is not the objective – winning for workers is the objective.

In the following sections we identify three areas of activity that must be at the heart of a strategic plan.

Clarify the role

Help those engaged in link leadership to know what their role is, what they can do and how they might develop

- Have a clear sense of the role of the link leader.
- Have expectations – people will often do more than might be expected if what is expected of them is clear.
- Start with small ‘asks’ – but scaffold activities so that link leaders can grow into the role.
- Link leadership is important in its own right – avoid drawing good link leaders into roles they do not want to undertake, simply because they ‘showed interest’. Avoid the risk of burning out any member who shows enthusiasm - or turning them off by giving them the jobs others do not want to do!
- Help link leaders to ‘make a difference’. Making a difference is a motivator – activism for its own sake seldom is. Organising is always for a purpose, not for its own sake. It is not a hobby.

Create the support

- Create the environment in which link leaders feel supported and valued.
- Build relationships – prioritise using in-person contact.
- Technologies help – group chats support fast, informal communication. These should be used to supplement in-person contact, not *in lieu*.
- Avoid isolation – many unions encourage workplace representatives to ‘pair-up’ so that each can support the other and one individual does not need to feel exposed.
- Develop horizontal networks – encouraging link leaders to connect with others in similar roles, for example across workplaces.
- Provide support and structure – but learn to trust and ‘let go’. Let energy develop – do not suffocate it.

Educate!

- Union power depends on what Marshall Ganz refers to as resources of ‘salient knowledge’ (including both relevant knowledge and skills). These do not just ‘exist’, but can be developed through education and training.
- Develop formal training programmes for link leaders – these are often national programmes, but local programmes are very powerful. Make sure programmes support link leader development, for example, having ‘introductory’ and ‘advanced’ versions.
- Use local training to connect link leaders and build networks.
- Train activists to become trainers so that link leaders see training delivered by their colleagues and peers.

- Train activists to support and develop other activists. Encourage activists to think about consciously supporting others. Union representatives who are not supported are more likely to quit – which is inefficient. A representative who stays, and develops, is invaluable. Time involved in activist development is always an investment.
- *Educate!* Basic knowledge transfer is important but union education should open up new possibilities and understanding. For example, effective link leaders understand their union and its history (and can communicate this to others). Likewise, they develop a sophisticated and critical understanding of policy and the political context. Union education is not only technical, but emancipatory. In the right circumstances, it should also be demanding.
- Consider how coaching and mentoring can support link leader development. This might be formal, or informal, or likely a combination of both. The resource can be intensive and care needs to be given to ensuring this is used where it has most impact. But as per above, this type of support is an investment that can provide real returns. It can also make an important contribution to supporting the development of those who do not always see themselves reflected in the union's activist leadership.



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