

## Article

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# *After the Strike*

## *Changing the Teacher-Board Relationship*

**Carol Beatty**  
and  
**Jeffrey Gandz**

*This paper describes four strike situations, following which teachers and school boards tried to engineer changes to their pre-strike relationships. The authors analyse these situations and identify some of the factors which appeared to distinguish the successes from the failures.*

Teacher strikes often leave a legacy of mistrust, and soured relationships between teachers, administrators and the school board trustees, in addition to any impact they might have on the delivery and quality of education. But in certain cases a strike can be cathartic and constructive, clearing the air and paving the way for the establishment of more co-operative and constructive relationships.

This paper describes four strike situations, following which teachers and school boards tried to engineer changes to their pre-strike relationships. Two were successful and two were not. The paper analyses these situations and identifies some of the factors which appeared to distinguish the successes from the failures. In so doing, it provides some support for various propositions relating to changing union-management relationships in general and in the educational sector specifically.

### **THEORETICAL FRAMEWORKS**

The early work of Walton and McKersie (1965) proposed that a collective bargaining relationship can be characterized by the underlying attitudes and beliefs that the parties hold about and toward each other. Arranged on

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a continuum from conflict through containment-aggression, accommodation, to co-operation and collusion, the relationship involves increasing levels of trust, co-operative tendencies, acceptance of the other party's legitimacy in representing the interests of a stakeholder group, and even some measure of interpersonal liking. The nature of this relationship both affects and is affected by the sub-processes and outcomes of distributive, integrative and intraorganizational bargaining and is the objective of the attitudinal structuring activities which take place as part and parcel of the ongoing collective bargaining relationship. Walton and McKersie's work contains many examples of how particular bargaining behaviors impact the underlying relationship and how the relationship, in turn, shapes the behaviors of the parties during collective bargaining activities.

More recently, some attention has been paid to investigating the dynamics of the relationships change process. Kochan and Dyer (1976) developed a model of organizational change in the context of union-management relations and generated a number of useful, but difficult to test, propositions. Their model drew very heavily on the Organizational Development (OD) literature, applying the concepts of planned organizational change established by Lewin (1947), Bennis, Beckhard, French and Bell, Greiner and many others who have contributed to a steadily increasing knowledge about how to change organizational designs and cultures. Kochan and Dyer developed these concepts in the content of collective bargaining which involves two distinct organizations (union and management) in a relationship characterized by frequently differing goals, conflict about both means and ends, and the exercise of power. They explain change in terms of internal and external pressures for change, a perception of self-interest in the direction of the change, the management of political risks, the perception of tangible benefits from change, and the integration of change with the collective bargaining process. In his subsequent work, Kochan (1980) refined some of these propositions and it is those propositions which are tested and discussed in this paper.

## **METHODOLOGY**

These propositions have generated a rather sparse empirical literature with the notable exception of Shuster's (1983) work in an industrial setting. As this study indicates, this should come as no surprise since their investigation requires very intensive case studies which are both difficult to do and lengthy to present.

For this field study, the staff of Ontario's Education Relations Commission<sup>1</sup> helped identify the most appropriate boards and a sample of four was selected using several criteria. All had experienced a recent strike, all had attempted in some way to move from a strictly adversarial to a more co-operative bargaining relationship. All four functioned in a similar legal, cultural and economic environment. We visited each site and interviewed a wide variety of teachers, federation officials<sup>2</sup>, administrators and trustees over a period of two years in order to both generate and corroborate a detailed history of the pre- and post-strike periods.

Most of the data were collected over a period of four months, but a follow-up occurred six months later. The cases covered events that had occurred over several months, but in all cases the strike was no more than two years in the past.

## CASE SUMMARIES

The four case studies are reported in detail elsewhere (Gandz and Beatty, 1986), but a brief summary of the main characteristics of each is included below.

### The Alford Board of Education

Alford is a medium-sized industrial city with a heavily unionized population of mixed ethnicity. During the turbulent 1970's, Alford experienced more than its share of disruptions, including two strikes, a lock-out, twenty mediation sessions and numerous other third-party interventions.

Before the seventies, teacher-board negotiations in Alford had been informal and working conditions were never discussed. However, a new generation of younger, more militant teachers became dissatisfied with the

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1 The Ontario Education Relations Commission was created to assist school boards and teachers in conducting negotiations. It provides detailed statistics on collective agreements, provides third-party assistance and supervises secret ballots in accordance with the provisions of the *School Boards and Teachers Collective Negotiations Act*.

2 All Ontario teachers must belong to one of the federations organized under the umbrella group called the Ontario Teachers' Federation. These federations perform many of the same functions of a union.

traditional bargaining processes and pressed for more participation. The board, on the other hand, resisted strongly any incursion on their «management rights». It took a long time and a lot of pain for the parties to establish a new relationship which was founded on a more equal partnership in the educational enterprise. In the end, the parties still did not demonstrate much friendship for each other, but each accepted the legitimacy of the other's involvement in the bargaining process, and each spoke of a growing trust in the other side. This trust was greatly facilitated by a change in both the senior management and the trustee group of the Alford board.

Ultimately, the bargaining relationship had evolved from conflict to accommodation (Walton and McKersie, 1965). The parties did not develop true co-operation, but the relationship has stabilized, and a return to conflict seemed unlikely. This board's then, was categorized as a successful change attempt.

### **The Birch Lake Board of Education**

The Birch Lake Board encompasses a small city and several surrounding communities, which were forced to amalgamate by the provincial government in the interests of greater administrative efficiency and educational quality. Unfortunately, the amalgamation left much misunderstanding, rivalry and mistrust in its wake. When the province imposed spending ceilings on all boards, data on expenditures came out into the open for the first time, and the teachers became angry to learn that the board had not been spending up to its limit. They demanded that more expenditures be directed towards teachers' salaries and improved working conditions.

Conservative trustees and administrators were shocked when the Birch Lake teachers went out on strike to back these demands, and a bitter battle ensued. After the strike, however, there was a large turnover of trustees and administration, paving the way for a radical change from an adversarial to a highly co-operative bargaining relationship.

The new trustees and administrators, led by an energetic and committed chairperson and director of education<sup>3</sup>, ushered in a climate of openness, trust, friendliness and acceptance of the legitimacy of both parties. The relationship had evolved a great distance from conflict to co-operation, and this change appeared to be quite stable. This too was categorized as a successful change attempt.

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<sup>3</sup> Each school board is governed by an elected group of trustees, led by a Chairperson and by the Director of Education who is the senior administrator of the board.

### **Gilbert's Cove Roman Catholic Separate School Board**

This small board, composed of an isolated northern town and surrounding rural communities, was consumed by a power struggle between French-speaking and English-speaking trustees, and between rural and urban factions. Amid this confusion, the director of education was able to gain almost unchallenged influence and to play one faction against another when he wished to push a policy through.

The teachers, however, became more and more dissatisfied with both the director's management style, and with their relatively low pay and lack of advances in working conditions. Their demands put a severe strain on this relatively poorly financed board, and when they went out on strike for the very first time, both sides were shocked and surprised by the personality clashes, hostility and insults which came out and were eagerly reported by the local media.

Following the strike, in which the teachers made substantial gains, the director and some of the trustees left, but the underlying causes of the divisions were not resolved. Despite the new director's sincere attempts at fostering co-operation, the parties remained largely adversarial. Indeed, they expressed much dislike and mistrust of each other, and many trustees accepted only grudgingly the teacher federation's role in the bargaining process. Because of this, we characterized the relationship pattern as containment-aggression and believed they could at any time revert back to their previous pattern of open conflict. This change attempt, then, was not successful.

### **Drummond County Board of Education**

This county board covers a large area of small, disparate rural and suburban communities surrounding a large, highly industrialized city. Most of the teachers lived in the city and when they began comparing their salaries and working conditions to their urban counterparts', expectations rose. On the other hand, the conservative trustee group was intent on holding firm on both issues. The trustees brought in a «tough» professional negotiator, and the teachers responded with a «work-to-rule» campaign when negotiations became stalled. The situation went from bad to worse, until finally, the provincial government appointed an arbitrator to resolve the dispute.

The next election changed the face of negotiations in Drummond County. A «liberal» group of trustees, led by an energetic negotiating

chairperson, was elected and a new director appointed. Both were oriented towards a more co-operative mode of bargaining, and many changes in the relationship were attempted. However, these two individuals did not work closely together, and the teachers remained aloof as well, so trust, liking, acceptance of each party's legitimacy by the other in Drummond County never reached the levels that were evident in Birch Lake.

As a matter of fact, subsequent elections restored a more «conservative» group of trustees to power, and the changes in the relationship appeared to be in jeopardy. The relationship pattern appeared suspended somewhere between containment-aggression and accommodation, but we felt, and so did many we interviewed in Drummond County, that it could revert back to open conflict at any time. Therefore, this was not a successful attempt at change.

### **RESEARCH FINDINGS RELATED TO KOCHAN'S PROPOSITIONS**

In the pre-strike period, all four of these relationships were typed as «conflict»: the parties mistrusted each other, were working toward different goals (e.g. lower teacher: pupil ratios for the union, cost reduction for the school board), were prone to assume that all issues represented zero-sum conflict (e.g. if the board wants to reduce consultants it must be to lessen the number of federation members), were contemptuous of the other party's legitimacy (e.g. this federation leadership does not represent the real feelings of out teachers), and there were high levels of personal dislike quite evident in our discussions with many of those interviewed.

Where we refer to «successful change» it is with respect to the shift in attitudes along the Walton and McKersie continuum from «conflict» to «co-operation» or at least «accommodation»; where we refer to unsuccessful change the relationships have either remained or reverted to «conflict» or not progressed beyond «containment-aggression».

#### **Proposition One**

The first of Kochan's propositions states that unions and employers will be reluctant to embark on significant efforts to change their established practices unless there are strong external and internal pressures to do so. Figure 1 indicates the nature and force of these internal and external pressures to change in the four school boards studies.

**Figure 1**  
**Sources and Strength of Pressures to Change the**  
**Federation-Board Relationship**

	<b>Alford</b>	<b>Birch</b>	<b>Gilbert's Cove</b>	<b>Drummond</b>
<i>Type of Change</i>				
<i>Pre-strike relationship</i>	Conflict	Conflict	Conflict	Conflict
<i>Post-strike relationship</i>	Accommodation	Co-operation	Containment- aggression	Containment- aggression to accommodation
<i>Pressure</i>				
<i>External pressure:</i>				
- government	Strong	Moderate	None	None
- public	Moderate	Strong	Strong	Strong
- media	Moderate	Moderate	Moderate	Weak
<i>Internal pressure:</i>				
- trustees	Moderate	Strong	Weak	Mixed
- administrators	Strong	Strong	Strong by director Mixed by others	Moderate by director Weak by others
- teachers	Weak	Moderate	Weak	Weak

In Alford, the impetus for change began from provincial government pressure in the form of continued legislative interventions and the imposition of third-party mediation and arbitration. However, government pressure alone may not have forced Alford to re-examine its relationship. Only when even the strike-inured Alford residents and media perceived that something was fundamentally wrong, did the parties begin to take serious notice.

Public opinion was the driving external pressure in Gilbert's Cove, where the Catholic community viewed a strike as fundamental attack on Catholicity and where there was a very real fear of loss of students to the public school system if it continued. As public pressure mounted, the media joined the fray, and the confrontation threatened to get out of hand. This



strong external pressure was a major factor in the growing awareness of certain trustees and administrators that the relationship between the board and its teachers needed improvement.

In both Birch Lake and Drummond County, external pressure came initially from a small group of concerned citizens who ran for office as trustees and subsequently attempted to transform the relationship from within. In Birch Lake, media and government initiatives later added to this pressure as well. It is interesting to observe that in Birch Lake and Drummond County, single-team bargaining<sup>4</sup> was first proposed by these same citizens after they had become trustees. In the other two boards, the strongest pressure group remained outside the board and less radical innovations than single-team bargaining were attempted.

External pressure appeared to be a necessary but not sufficient cause of a change attempt. It had to be converted into internal pressure, preferably in the form of one or several «champions» of change. Even that was not sufficient, these champions had to build up a critical mass of people who supported their ideas before enough internal pressure could be generated.

Birch Lake and Drummond County provide an interesting contrast in terms of internal pressure, champions and a critical mass of support. For example, in Birch Lake a new chairperson supported by other, relatively new trustees, championed the idea that there had to be a «better way» to approach collective bargaining. The same was evident in Drummond County where the influx of many «progressive» trustees generated a similar pressure. One of these trustees became a strong advocate of «single-team» bargaining and a co-operative orientation.

In both Birch Lake and Drummond, then, there was a clear «champion» of change — a person who crusaded for change with considerable energy. However, the Drummond County champion did not gain as much support for her ideas among fellow trustees as the Birch Lake champion. Also, in Birch Lake a new director with similar views to the champion's was hired from outside the board. In Drummond County, however, the new director had been a junior superintendent there before being promoted over his colleagues. Several of these senior administrators opposed the move towards a more co-operative relationship. In this environment, it was not surprising that the new director was wary of aligning himself with the champion and her group.

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4 Single-team bargaining usually involves a small, problem-oriented bargaining team drawn from both parties. Members are to arrive at the bargaining table with areas of concern identified, but without preconceived solutions. Information is shared openly, as members try to create a solution that satisfies both parties' concerns.

In Birch Lake, a critical mass of supporters for the new relationship built up quickly, facilitated by the massive turnover in «old-guard» trustees and administrators. In Drummond County, there was very little such turnover in the administration, and successive waves of trustees with alternating «progressive» and «conservative» agendas were elected to the board. Thus supporters of the change never constituted a critical mass in Drummond County.

The building of a critical mass of supporters for change in Alford took place more gradually than in Birch Lake, largely because of a slower turnover of key people. Perhaps, for this reason as well, the change was not as radical. Finally, the new director in Gilbert's Cove could not create a critical mass from among the militant teacher groups or among warring factions of trustees and administrators. He stood almost alone in his vision of a cooperative relationship between the board and its teachers.

Thus the four case studies support Kochan's proposition that external and internal pressure are necessary to motivate change attempts. The following elaborations to this proposition should be added as well:

- 1a. If external pressure comes from more than one source and if it is converted to internal pressure, it is more likely a relationship change will be attempted.
- 1b. A respected, influential, and charismatic champion enhances the probable success of the change attempt by exerting personal pressure to change.
- 1c. A critical mass of supporters for the change must be built by its advocates before it can take hold.

These elaborations are quite similar to propositions advanced by scholars of organizational change and development (Beer, 1980; Beckhard and Harris, 1977; Mikalachki and Gandz, 1982), and lead one to the conclusion that there may be important parallels between an organizational change and change in union-management relationships.

### **Proposition Two**

Kochan's second proposition states that both parties must see it as in their self-interest to change in the direction being promoted.

The idea of «parties» is hard to relate to in these cases. It implies that the trustee group, the administration, the federations, are somehow homogeneous entities. This was simply not the situation in any of the four cases. There were some trustees, some administrators, some teachers who

saw the change in their self-interests, others who did not. Figure 2 indicates the extent to which the change was perceived as acting in the self-interest of some of the key players in the relationships.

In the Alford case, economic self-interest finally convinced the teachers that a more co-operative relationship was appropriate. The teachers had made large gains through militant action against a weak board, but after a new director of education and a new director of personnel to handle collective bargaining were hired, the board was in a much stronger position. A stalemate followed after the board stood its ground, forced the teachers to mount a long strike and did not concede to their demands.

Figure 2

	Patterns of Perceived Self-Interest in a Changed Federation-Board Relationship			
	<i>Type of Change</i>			
	<i>Alford</i>	<i>Birch</i>	<i>Gilbert's Cove</i>	<i>Drummond</i>
Change Attempt	Successful	Successful	Unsuccessful	Unsuccessful
	<i>Perceived Self-Interest</i>			
Trustees	Moderate	High	Moderate to Low	Divided between High/Low
Administration	High	High	Low/Director High	Director (and a few supporters) High/Rest Low
Teachers	Moderate	Moderate to High	Low (against)	High

After the Birch Lake strike, all three parties quickly came to the conclusion that a co-operative relationship was in their best interests. Many of the teachers believed they could improve their position by co-operating. The new group of trustees elected during the strike had come in with a change agenda and clearly saw it in their self-interest to live up to election promises. There were dissenters in Birch Lake, but they were outnumbered and effectively sidelined by the new director of education.

In Gilbert's Cove, the situation was very different. Here some of the trustees viewed any form of collective bargaining as inimical to their «management rights». Furthermore, there were so many tensions between

French and English, rural and urban trustees that it was unclear whose self-interest was being served at any one time. The administration was similarly divided, with the new director acting as the sole advocate of co-operation. Only the teachers were fairly united, but they believed that co-operation with this board was risky. Furthermore, the teachers' chief negotiator was running for provincial office on a militant platform and co-operative behavior was inconsistent with this stance.

In Drummond County, similar divisions existed. Several influential «oldguard» superintendents opposed a more co-operative stance. They saw federation input and influence as a direct threat to their own power. The new trustees were unable to command a stable majority over the course of the next few elections and some were replaced by a «conservative» faction opposed to co-operation. The teachers did perceive benefits in single-team bargaining, but they remained distrustful of both the administration's and the trustees' intentions. All three parties appeared poised to revert to conflict if the need arose.

In all four cases, some people saw change as in their self interest, but others did not. Here again, the idea of a critical mass appeared to operate. Only when it was in the interest of a substantial number of individuals within a group was the change accepted by that group. Because the benefits were not readily perceived by many individuals in at least three of the four cases, the change was difficult to sell.

Thus the data in the four cases support Kochan's second proposition but in a modified form:

2a. A change must be perceived to be in the best interests of either a substantial majority or a very powerful faction of a group before that group will support a changed relationship. The more of these supporters there are, and the more powerful they are within the group, the more profound and stable the change will be.

Researchers concerned with resistance to both organizational and technological change have also observed that change will be resisted by an individual unless it is perceived to be congruent with his or her perceived self-interest (Kotter and Schlesinger, 1979) and the present study extends this observation to groups.

### **Proposition Three**

This proposition states that the implementation of any change involves major political risks to both union and management representatives which

must be managed. People resist changes for a variety of reasons, and the political leaders of management and union groups must be able to anticipate and overcome resistance.

Some resistance may be generated because the change is misunderstood or misinterpreted; it may violate values or behavioral norms; it may be perceived as having bad side effects; it may confer unequal benefits on one of the parties; it may create feelings of incompetence to adapt; it may just happen too fast! If these sources of resistance are not anticipated and managed, the change may never take root.

In the four cases risk was not confined to the supporters of the change as Kochan's proposition implies. The major risks were incurred by those opposing the policies advocated by the strongest faction. The problem for those involved, however, was knowing which faction would win, and whether the victory would be stable. In Birch Lake, for example, holdouts among the administrators who resisted increased co-operation with the federation were shunted aside or pressured into early retirement. To a lesser extent, this also happened in Alford. In Gilbert's Cove, the major risk was borne by the new director who promoted more co-operation, while the others adopted a «wait and see» stance. His was clearly a precarious position, especially if another strike were to take place. In Drummond County, the new director could have found himself in quite a similar situation, but he avoided it by not identifying himself too closely with the new bargaining relationship.

If the conditions are not right for the change to take hold, then those advocating it incur more risk than those opposing it. The reverse is true for situations where the forces for change are the stronger faction. In addition, the most risky period occurred not during the change attempt, but previous to that, when pressure and dissatisfaction with the old ways mounted to their highest point. In all four cases, the most visible target for this dissatisfaction was the director of education, and in all four cases, the directors either left voluntarily or were forced out after the strikes. The same thing happened to several trustees who were defeated in the elections following the strikes.

Because Kochan's proposition deals primarily with the risk to the change advocates, we might add:

- 3a. Change involves major risks to both union and management representatives, but the risks are different at different stages of the change. During the dissatisfaction or pressure stage, the leader and others identified with the breakdown in the relationship are at risk. During the change attempt, the change advocates incur more risk, but once the change gathers momentum, it is the resisters who are in jeopardy.

The four case studies also confirm Kochan's statement that risk and resistance must be managed for a change to take root. The change was more successful in the two boards that actively managed resistance. In Alford, for example, the two key administrators who wanted to move to a more co-operative relationship were prepared for federation resistance. They overcame it by persistence and patience in handling contract administration fairly and by holding firm on certain bargaining positions they felt were necessary. They did not panic when the teachers were slow to respond.

In Birch Lake, resistance was minimized by a number of devices. A leadership program, a trustees' orientation program, joint committees, input gathering mechanisms, and reward systems all served to socialize people into the new way of doing things. That the change was installed so quickly was at least partially explained by the director's conscious plan to gain wide commitment for the changes and to lower resistance.

By contrast, the management of resistance in Gilbert's Cove and Drummond County appeared minimal. In these two boards, the administrations were not united behind the directors, and the directors appeared to lack either the opportunity, the expertise or the passion to structure such a management team.

Kochan also suggested that the role of the union leaders in a co-operative relationship is more difficult than that of the managers since they must walk the tightrope between appearing to be the source of the benefits yet remaining independent and un-coopted by management. This implies that either management or some third-party (government, consultant, mediator, or other) will be the driving force behind change at the implementation phase so that union leaders can avoid the political risk associated with changing the status quo.

Particularly in the two single-team bargaining situations, federation officials expressed concern over the fine line between co-operation and collusion and the perception of the uninvolved rank and file about their activities. In Birch Lake, bargaining activities were kept as open as possible and involved large numbers of teachers in various committees to «co-manage» aspects of the school system. Despite all of these things, the federation officers in Birch Lake were continually fending off accusations that they were being co-opted against the interests of their membership.

Nowhere was the political issue more apparent than in the Gilbert's Cove situation where the teacher's chief negotiator during the strike was running for senior provincial office. Although personally interested in developing a more co-operative relationship, he was also acutely aware of the need to maintain a note of militance since this was expected of him by the other local federations in the province.

Kochan stated that the union leaders' role is ambiguous during a relationship change and, so it follows, that the trustees and/or administrators are more likely to be the driving force. This was certainly true in the four boards studied. However, contrary to Kochan's prediction, the risk to the federation leaders and the prices they paid were not comparable to the administrators' risks. Some federation leaders lost a measure of influence during the change period in Birch Lake, but in the other three cases, there was either no shift in power or a gradual, bloodless one. This was not the case for trustees, some of whom were voted out of office because of the stands they took regarding the bargaining relationship with teachers. Yet in all four cases it was the administrators, chiefly the directors of education, who paid with their jobs when dissatisfaction concerning the bargaining relationship reached a certain level, or when they were perceived as obstructing a desired change. In the educational sector at least, Kochan's proposition needs modification to take this special risk into account:

- 3b. In educational bargaining, the administrators bear a larger share of both the responsibility and the risks of change. If strongly identified with one of the sides during a bitter strike, they may be forced out of their jobs in a reform attempt. If they are change advocates and the change is unsuccessful, they are again at risk, but less so unless a strong counter-reform focuses attention on them.

#### **Proposition Four**

This proposition states that people in diverse interest groups must be able to see tangible results from the change if they are to pursue further change efforts. The change process is effectively energized or fuelled by its own success.

The extent to which there were widely-held perceptions of tangible gains from a new relationship were, as shown in Figure 3, clearly different in Alford, Birch Lake and — to some extent, Drummond County — than they were in Gilbert's Cove.

It is this proposition that is most clearly exemplified by the Birch Lake case. First, the director in Birch Lake announced an explicit set of objectives and prepared regular progress reports. He celebrated the successes, thereby energizing continued change. Most importantly, he rewarded energetic supporters with tangible benefits in the form of promotions and preferred assignments.

**Figure 3**

**Perceived Tangible Gains from Improved Federation-Board Relationship**

	<i>Type of Change</i>			
	<i>Alford</i>	<i>Birch</i>	<i>Gilbert's Cove</i>	<i>Drummond</i>
	Successful	Successful	Unsuccessful	Unsuccessful
	<i>Perceived Tangible Gains</i>			
Types of Gains	No strike/lock-out	No strike/lock-out	No strike/lock-out	No strike/lock-out
	Improved grievance management	Co-management	Lessened tensions between Fedn. & admin.	Increased pay
	Trustees increased policy & financial control	Professional development		Some joint decision-making
	Reduced tensions	Improved job security, salary, benefits		Improved job security
Perceived Gains by:				
Federation	High	High	Low	Low
Administration	High	High	Moderate	Mixed
Trustees	High	High	Low	Mixed

There were very real benefits to the federations as well — improvements in staffing, better working conditions, greater job security, more «due process» types of contractual language, and above-average salary and benefits gains. Trustees did not resist these gains as savings were effected in other areas. What was critical was that both the board and the teachers involved in the new bargaining relationship were able to realize tangible gains.

In Drummond County, on the other hand, the gains made by the teachers in staffing and working conditions were largely attributed to the impact of an arbitration award rather than to single-team bargaining, so their commitment to maintaining this change was not very deep. Several of the administrators in this board equated single-team bargaining with a loss



of their power and, therefore, opposed it. The director too, remained ambivalent about the «gains» attributable to single-team bargaining. It is no wonder, then, that this change and indeed any improvements in the relationship itself seemed precarious to the parties.

In Alford, the accommodative relationship did not result in any direct monetary gains for the teachers. However, the absence of overt conflict and a better day-to-day working relationships were seen as tangible benefits by many teachers interviewed and by most administrators and trustees. The teachers appreciated the integrity with which the contract was administered and grievances were handled. Teacher militance, however, remained a strong undercurrent in Alford and could erupt if the teachers fall far behind others in the province.

It is really only in Gilbert's Cove that there was very little sense of gain from the relationship change. There was still a feeling among some trustees that the price paid for peace was too great. The teachers, in turn, remained dissatisfied with their gains and were suspicious of both the trustees and the administration. It was mainly the new director who perceived some real benefits in a co-operative relationship as he was ostensibly hired to promote it. As many others appeared to enjoy conflict somewhat, the changes towards co-operation remained superficial.

The four case studies provide support for Kochan's proposition that real benefits must be realized before further change is pursued. To this we would add:

- 4a. It is important to publicize the tangible benefits from the change as well as progress towards these benefits. It is equally crucial that benefits be attributed to the change being advocated, or it could falter and the status quo could be restored.

This proposition is consistent with the findings of organizational change scholars such as Greiner (1967).

### **Proposition Five**

This proposition states that, over the long run, successful efforts must be integrated with the formal collective bargaining and contract administration processes. Collective bargaining is too established for people to believe that it can be replaced by something which is seen as an alternative.

It is clear that in the Gilbert's Cove case the trustees believed a co-operative relationship was antithetical to responsible collective bargaining and would weaken their ability to represent the taxpayers' financial in-

terests. Therefore, it seemed doubtful that a more co-operative relationship could ever be integrated into Gilbert's Cove formal bargaining processes on a long-term basis.

This is in sharp contrast to Birch Lake, where co-operation was perceived as consistent with collective bargaining and where formal single-team bargaining was complemented by a large number of committees, task forces, and other groups working on co-operative tasks. In Drummond County, on the other hand, single-team bargaining existed apart from other board processes and values. In Alford, the accommodative relationship was firmly entrenched in board processes, expectations and value systems. In both Alford and Birch Lake, this integration was accomplished largely because of two factors; a director, backed by a management team, firmly committed to co-operation as a working philosophy, and a special administrator, whose time was completely devoted to both collective bargaining and contract administration. This latter individual, in both boards, was perceived as skilful, honest and practically indispensable by all parties. It appeared from the four cases that very few board administrators had sufficient knowledge and training in management techniques to take this systematic approach.

The four case studies support Kochan's fifth proposition that change must be integrated before it stabilizes. We would take this a step further and add:

- 5a. Administrative devices are crucial to accomplish integration of the changed relationship. Without this integration, a fragile co-operative relationship can easily regress to the more commonly understood conflict model.
- 5b. Integration of a new co-operative relationship is enhanced by the administrative device of having the same individual responsible for both contract negotiations and administration.

## **OTHER FINDINGS**

The change process in union-management relations depends on a fragile balance. It depends on the influence of key individuals in the right place at the right time, possessing high motivation, the appropriate attitudes and personalities, plus considerable expertise in managing change. Kochan's propositions deal with many of these variables, but could be enriched by further propositions relating to attitudes, personality conflict, expertise and balance of power.

### **Balance of Power**

The motivation to move to a more co-operative relationship appeared in the four cases to be influenced by parties' perception of the relative balance of power. For example, early in the Alford experience, the teachers had the upper hand and they promoted conflict in order to maximize their gains. The same was true of the trustee groups at various times in the bargaining history of the four boards. On the other hand, movement towards a more co-operative relationship in Alford took place only when it became clear that the board was prepared to be, and was able to be, just as tough as the teachers. The teachers concluded that continuation of conflict tactics would have led to the industrial relations equivalent of mutually assured destruction. This can be stated in proposition form as follows:

- 6a. A perception of equal balance of power enhances the probable success of a change to a more co-operative relationship.

### **Personality Conflict**

Personality conflicts can arise between individuals within a party or across parties. It was mainly the latter which affected the development of more co-operative relationships in this study. Personal animosities, and in some cases a desire to defeat or injure another individual, can sabotage attempts at change, however well intentioned. In Gilbert's Cove, for example, the animosity between the trustees' and the teachers' chief negotiators was legendary and prevented them from reaching any sort of accommodation. Personality conflicts of this magnitude arose primarily when the individuals involved were perceived as either rigid, dishonest, devious, or abrasive. On the other hand, co-operation was enhanced when key individuals were perceived as sincere, honest, caring, open, fair and flexible. Improvements were often attributed to the efforts of these sincere individuals, and the removal from the bargaining arena of others whose personalities clashed with key players, especially in Birch Lake and Alford. This personality dimension can be stated as follows:

- 6b. The effort to improve the bargaining relationship is aided or impeded by the perceived personality characteristics of key individuals and moves toward co-operative relationships require careful selection of key players in collective bargaining activities.

### **Management Expertise**

From the four case studies, management expertise appeared to be one of the most crucial prerequisites in implementing a positive relationship change. By management expertise, we mean a knowledge of people and their motivations, a knowledge of administrative systems and how they can be used to promote and reinforce change, a knowledge of planning and goal-setting techniques and an ability to build a strong, united management team as well as solid coalitions with other parties. These were rare skills among educational administrators and were certainly even rarer among teachers and trustees, with one outstanding exception in Birch Lake.

A more detailed description of the Birch Lake director's actions will help to illustrate this point. This new director laid out a clear statement of expectations, key responsibilities and goals for himself as his first task in office. He attached a time-table to this statement and circulated it widely as a visible commitment to change. He was able to build the commitment of other key people in the system, marshal the required resources, attract and retain the people needed to implement his plans, and invest in building the skills of those who had to make the new relationship work. Structural changes such as the creation of the new position of superintendent of personnel, of joint problem-solving committees, of long-range planning and policy development bodies all reinforced the co-operative relationship by ensuring teacher input outside of formal bargaining. In summary, he was a leader who possessed the vision, energy and skills to accomplish a major turnaround.

In Alford as well, the new director possessed management expertise, as did his new director of personnel. In the other boards, the directors did not appear skilled to the same degree. It was also noteworthy that the directors of Alford and Birch Lake were not the only talented managers, whereas in Gilbert's Cove and Drummond County, the directors stood virtually alone. The proposition concerning management expertise can be stated as follows:

- 6c. The effort to improve a bargaining relationship is highly dependent on the management expertise of the chief administrator and his or her management team.

### **CONCLUSION**

With the appropriate modifications, the planned change OD literature offers real insights to the process of changing union-management relationships and these four case studies have provided additional empirical support

for the propositions developed by Kochan and Dyer. The studies indicate the importance of a recognition of the need for change which emanates from felt external and internal pressures, including the perception of some balance of power and, therefore, the futility of pursuing approaches requiring the «destruction» of the enemy. In initiating change it is quite clear that the key parties must see some tangible benefits and the cases also emphasize the need to manage the politics of change while these benefits are sought and to recognize and publicize the tangible gains as they materialize. Finally, the need to integrate newly developed practices and procedures into the collective bargaining process, rather than risk their perception as undermining to that process, is clearly recognized.

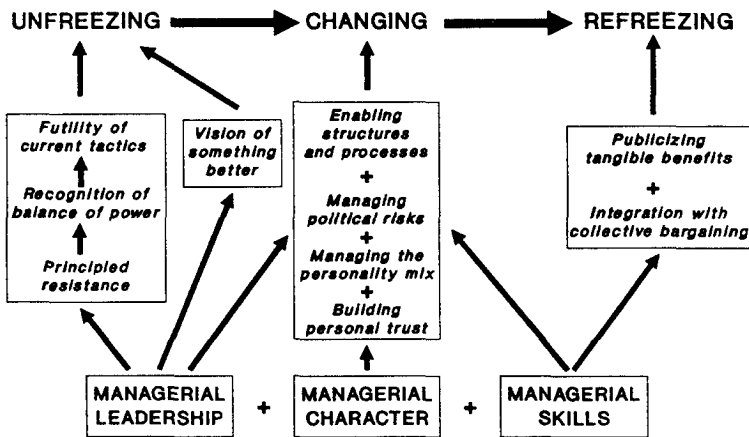
Although we did not set out to conduct a study of leadership in the educational context, we were struck with the tremendous contribution that highly skilled management can make to this process of initiating, fostering, and institutionalizing a changed relationship. The gap between recognizing that «something needs to be done» and actually getting it done — to the point where the new relationship has actually stabilized — was filled in our two «successful» cases by highly skilled managers. As Figure 4 illustrates, these managers were instrumental in unfreezing the existing relationship, promoting and managing the change, and reinforcing the more co-operative resulting relationship using their knowledge of change process, and administrative structures as well as highly developed interpersonal skills.

In the process of so doing, these managers exhibited many of the qualities of charismatic and transformational leaders (House, 1976; Bass, Avolio, and Goodheim, 1987) in their clear articulation of vision, their enthusiasm and energy devoted to bridging vision and reality, and their high levels of personal involvement with people in bringing changes about. Beyond this, however, we were aware of something that we can only label «managerial character» — a high level of integrity and preparedness to take judicious risks in achieving their objectives. As the models of the dynamics of union-management relationships unfold and develop, we believe that they must recognize the critical role of management skills, character and leadership if they are to be complete and useful.

For a change towards a co-operative bargaining relationship to be successful, several factors must be in place. Kochan has identified several of them, and this study supported many of his propositions. However, extensions and modifications of Kochan's model are necessary to improve its predictive validity. This field study was able to generate several additional propositions which could be tested in different contexts to determine their generalizability.

Upon reflection, it seemed to us that many of the modifications and additions we made to Kochan's propositions were implicit in the «rational» models of change derived from Lewin's pioneering work by various authors<sup>5</sup>. We have attempted to integrate several such insights into Kochan's model from our four case studies, but believe much more remains to be done. This literature may well be a rich source for further models and propositions useful to both scholars and practitioners for understanding change in union-management relationships.

Figure 4  
Changing Union-Management Relationships



<sup>5</sup> See P.R. LAWRENCE, «How to Deal with Resistance to Change», *Harvard Business Review*, May-June 1954, pp. 47-48; J.P. KOTTER and L.A. SCHLESINGER, «Choosing Strategies for Change», *Harvard Business Review*, March-April 1979, pp. 106-114; G. ZALTMAN and R. DUNCAN, *Strategies for Planned Change*, New York, Wiley, 1977; L. GREINER, «Patterns of Organizational Change», *Harvard Business Review*, May-June 1967, pp. 119-128.

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***Post mortem d'une grève: les modifications dans les relations entre enseignants et conseils scolaires***

Les grèves chez les enseignants, tout en ayant des conséquences nocives, peuvent être curatives et permettre l'établissement de meilleures relations du travail. Le présent article traite des suites de quatre grèves où des tentatives eurent lieu en vue d'améliorer les relations professionnelles. Deux d'entre elles ont été un succès et les deux autres, un échec.

L'étude s'appuie sur le modèle de Walton et de McKersie pour classifier les relations sur un continuum allant du conflit à la coopération, avant et après l'expérience de changement. Elle considère aussi les diverses propositions de Kochan sur les changements dans les rapports entre syndicats et employeurs au moyen de l'analyse de quatre études de cas.

La première proposition de Kochan soutient que syndicats et employeurs se montreront réticents à s'engager sur la voie de changements profonds à moins qu'il n'y ait de fortes pressions en ce sens tant de l'extérieur que de l'intérieur. Les quatre cas étudiés confirment cette assertion à laquelle il faut ajouter les précisions suivantes:

- Si la pression extérieure provient de plus d'une source et si elle se répercute à l'intérieur, il est plus probable que l'on essaiera de modifier les relations entre les parties.
- Un chef respecté, influent et charismatique accroît les chances de succès vers le changement recherché par son influence personnelle.
- Il faut en arriver à obtenir «une masse critique» de partisans favorables au changement envisagé avant son implantation.

Sa deuxième proposition énonce que les deux parties doivent estimer qu'il y va de leur intérêt propre de s'orienter dans le sens du changement proposé. Les cas étudiés ont démontré que cette affirmation était trop simpliste et les auteurs la modifient ainsi:

- Le changement doit être perçu comme favorisant les meilleurs intérêts d'une majorité substantielle ou d'une fraction très puissante d'un groupe avant que celui-ci endosse les modifications proposées. Plus les partisans sont nombreux et plus ils sont puissants, plus le changement sera profond et durable.

La troisième proposition soutient qu'il y a des risques pour les dirigeants du syndicat, si les membres ont l'impression que ceux-ci coopèrent avec la direction, Kochan en déduit que la recherche de changement viendra de l'employeur. L'enquête lui donne raison sur le dernier point, mais elle l'infirme sur le premier. Les études de cas amènent les auteurs à proposer ce qui suit:

- Le changement comporte des risques considérables tant pour les représentants du syndicat que pour ceux de l'employeur, mais ces risques varient selon les différents stades d'implantation du changement. Aux périodes de mécontentement et de pression, les chefs et les partisans de la rupture des négociations courent des risques. Quand on tente d'introduire le changement, ce sont ses supporteurs qui encourent le plus de risques mais une fois qu'il est bien engagé, ce sont ceux qui s'y opposent qu'on retrouve sur la défensive.
- Au cours des négociations dans le secteur de l'éducation, les administrateurs portent un fardeau plus lourd en ce qui a trait à la responsabilité et aux risques d'un changement d'attitude. S'ils sont identifiés totalement à l'une des parties au cours d'une grève très dure, on peut les obliger à se retirer quand on veut introduire le changement. S'ils sont favorables à celui-ci et que l'expérience des



négociations échoue, il y a encore danger pour eux, mais il est moins grand, sauf si un fort mouvement en sens contraire attire l'attention sur eux.

La quatrième proposition soutient qu'il faut obtenir des gains réels avant de s'engager plus loin. Elle est confirmée par les quatre études de cas, mais il faut ajouter ceci:

- Il est bien important de faire connaître les gains obtenus grâce au changement de même que les progrès escomptés. Il est également capital que les gains soient associés à ce changement car s'il échoue, on risque de revenir au statu quo.

Enfin, Kochan estime que les mécanismes du changement doivent être insérés dans la procédure de négociation collective, si l'on veut une amélioration durable. Les études de cas confirment cette assertion, mais il y a lieu d'aller plus loin:

- Les mécanismes administratifs sont essentiels à l'intégration des nouveaux rapports entre les parties. Sans cela, des relations harmonieuses peuvent facilement régresser vers un état de conflit.
- L'intégration de relations professionnelles plus coopératives se trouve favorisée si, au plan de l'administration, c'est la même personne qui est responsable à la fois de la négociation et de l'application de la convention collective.

L'étude de cas a fait ressortir d'autres propositions dont Kochan n'a pas traité. Les voici:

- La perception de l'existence d'un équilibre des forces accroît la probabilité du succès d'un changement dans le sens de l'établissement de relations plus harmonieuses entre les parties.
- Les caractéristiques personnelles des principaux dirigeants sont de nature à favoriser ou à entraver, selon le cas, les efforts tentés en vue d'améliorer les rapports de négociations, ce qui exige une sélection prudente des principaux acteurs.
- Les tâches d'assainissement des rapports de négociations dépendent pour beaucoup de l'expérience en la matière de l'équipe administrative.

Pour que la transformation des relations professionnelles atteigne plus d'équilibre, il faut mettre en place plusieurs instruments. Kochan en a signalé un certain nombre et le présent article en confirme plusieurs. Cependant, il s'impose d'ajouter certains aspects au modèle de Kochan et de le modifier pour en améliorer la justesse prévisionnelle. Ainsi, la présente étude a fait ressortir plusieurs propositions supplémentaires qu'on pourrait vérifier dans des contextes différents pour en assurer la généralisation.

Les modalités de transformation notées par Kochan pour établir ses propositions peuvent être approfondies davantage de façon à favoriser la mise au point de changements potentiels dans les relations entre employeur et syndicats. Enfin, il semble que le dynamisme de l'agent du changement est un élément très important dans les cas qui ont été couronnés de succès.