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Private Sector Unions and Strategic Planning

A Research Agenda

Kay Stratton
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Yonatan Reshef

Private sector North American trade unions have declined in recent years. This paper argues that to prevent further erosion, unions should engage in strategic planning. Further, it highlights the importance of resource analysis to predict a union's likelihood to strategically plan, and presents relevant research hypotheses.

North American private-sector trade unions are facing major organizational challenges. In the U.S., between 1953 and 1986, although public-sector unions' density grew from 11,6 percent to 36 percent, private-sector unions' density declined from 35,7 percent to 14 percent (Troy, 1986; Freeman, 1987). In Canada, during the past decade the overall level of unionization has been remarkably stable at around 38 percent, but this has also been due to a dramatic growth in public sector unionization compensating for losses in the private sector (Dion and Hébert, 1989). Since «[t]he most important determinant of union density is the impact of private sector unionization» (Meltz, 1989), the North American labor movement should reverse the private-sector union decline if it is to prosper.

Researchers have proposed that to prevent further erosion of their institutional position, labor unions should take a greater role in corporate level policy making (Kochan, McKersie and Cappelli, 1984; Kochan and Piore, 1984; McKersie, 1985); search for a new action orientation which will

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emphasize a more global agenda (Reshef, 1988); adopt a new paradigmatic perspective of their goals and the employee-employer relationship (Murray and Reshef, 1988); and entertain strategic options which can be implemented independently of the traditional institutions of unionization and job regulation (Reshef and Murray, 1988). Implicit in the aforementioned arguments are the ideas that unions should advance to a new paradigm or conception of their role in society by adopting a new strategy stressing control over environmental changes, and that strategic action will inevitably result in enhanced organizational performance.

This paper attempts to (1) link a new union paradigm with a new union strategy by suggesting that unions should engage in strategic planning[1]; (2) present union resources as important constructs in predicting a union's likelihood to engage in strategic planning; (3) propose relevant research hypotheses for analyzing the union resource-strategic planning relationship; and (4) ground the research hypotheses by offering an illustrative example focusing on the Communications Workers of America (CWA), Local 7800.

CHANGING ENVIRONMENTS AND UNION DECLINE

Several environmental factors have been proposed to account for union decline in the United States, some of which apply to Canada as well. Both countries are moving to a service economy and employment in the goods-producing sector is not expanding significantly due to the introduction of new, labor-saving technologies and «job export» policies.

Worse, unions have been unable to keep their share of the manufacturing work force. In the U.S., between 1980 and 1984, unions lost 1,4 million members in manufacturing, while the number of nonunion manufacturing workers rose by 700,000. In the same period, unions' share of the manufacturing work force fell from 32,2 percent to 26,5 percent (Wessel, 1985).

In Canada, between 1975 and 1985, the total number of jobs in goods-producing industries increased by 6,2 percent, whereas union density (the proportion of non-agricultural workers organized by unions) declined by 14 percent. In the service-producing industries, the total number of jobs rose by 31,6 percent, with an increase of 61 percent in union density. Yet, the large union density increase in the service-producing industries is largely due

1 We agree with an anonymous referee that strategic planning may differ based on what a union intends to achieve through the process, e.g. member recruitment or provision of better benefits (see Stratton and Brown, 1988). For the purposes of this article, however, the concept of strategic planning is used in a more general sense.

to a 72 percent growth in the community, business and personal services which include the highly unionized education and health care industries (Statistics Canada, 1977, 1988a; 1988b).

The transformation of employment patterns has been accompanied by a long-term shift in the demographics of the labor force in the U.S. and in Canada. Newly created service-producing firms — such as paralegal, physical therapy, computer programming, retail sales, foods, and system analysis — are employing more women, retirees, part-timers, immigrants, and highly educated and mobile workers. Unions, however, have organized only a minority of these new labor force entrants.

Additionally, in both Canada and the U.S., organized labor's relative power has been weakened by a series of recessions starting in 1973, deregulation of the highly unionized transportation industry, and dramatically heightened foreign and domestic competition. In the U.S., for example, the ratio of imports to gross national product, a standard measure of economic openness, increased from 4,6 percent in 1960 to 12,0 percent in 1980 (Bartel and Lichtenberg, 1987). The respective figures for Canada are even higher, 21 and 27 percent (*Bank of Canada Review,* 1975 and 1988).

Obstructive legal decisions have further reduced unions' influence so that, in the U.S., «[e]ven when employees do select an exclusive representative, they may find themselves with less influence than organized workers previously enjoyed» (Craver, 1985, p. 609).

In Canada, Panitch and Swartz (1988, p. 31) have recently pointed out that a new era in state policy toward unions is emerging. This era is marked by

> a shift away from the generalized rule-of-law form of coercion (whereby an overall legal framework both establishes and constrains the rights and powers of all unions), towards a form of selective ad hoc, discretionary state coercion (whereby the state removes for a specific purpose and period the rights contained in labour legislation).

In addition to ad hoc state coercion, several provincial governments (British Columbia, Alberta, Saskatchewan) have passed labor legislation which curtails the capability of some unions to use collective bargaining and collective action to promote members' interests.

In sum, the move to a service economy, changes in labor force demographics, weakening of the economy, labor legislation, and legal decisions have all contributed to private sector union decline.

UNION PERFORMANCE AND ORGANIZATION

The aforementioned challenges have influenced the organization and performance of private-sector unions in four interrelated ways. First, the onset of the economic developments with the advent of concession bargaining (mainly in the U.S.) has diminished unions' capabilities to deliver the two most important things workers expect from their jobs — a good salary and job security. There is growing evidence that since the late 1970s, in both the U.S. (Bernstein, 1986a; Freeman and Kleiner, 1988; Bureau of National Affairs, 1988) and Canada (Adams and Saul, 1988; Gibb-Clark, 1988; Panitch and Swartz, 1988, p. 100) the union wage effect is becoming less positive than it once was. Worse, over the last decade, unions, especially in basic industries (auto, steel, rubber, mining), proved ineffective in protecting their members' jobs. Ironically, sometimes massive layoffs and wage cuts, such as in the automobile industry, paved the way for innovative *quid pro quo* agreements such as employment-security plans, in themselves contingent upon the economic performance of the firm (Cappelli, 1982).

Second, not only have union capabilities to deliver selective benefits been eroded, there is ample evidence, especially in the U.S., that nonunionized companies are providing workers with an increasingly growing host of welfare services, such as pensions, life and health insurance, training and education, and counselling on personal problems, thus eliminating the need for a union (Cornfield, 1986; Foulkes, 1980; 1981; Feinstein and Brown, 1982; Masi, 1982). For example, some nonunion companies such as IBM, Delta Airlines, Eli Lilly, Federal Express, or Hewlett Packard are willing to adopt nontraditional work processes to gain worker commitment and satisfaction so they remain union-free (Foulkes, 1988). Further, Worthington Industries, a U.S. steel company, and Magna International, a Canadian automotive company, keep their work force at approximately 100 persons per plant to facilitate communication and increase employee-management trust. Finally, evidence suggests that many nonunion workers do not view unions as being able to make a significant difference in their work situation and that the traditional industrial relations system is not sufficient for meeting their current needs (Kochan, Katz and McKersie, 1986). This, combined with the fact that nonunion workers are more pleased with their pay, job security, and other aspects of work than their counterparts were seven or eight years ago, even though real earnings have declined since 1977, may account for the fact that non-managerial, nonunion U.S. workers' desire for union representation fell from about 40 percent in 1977 to 32 per cent in 1984 (Farber, 1987).

It is not, therefore, surprising that, third, unions have been facing recruiting difficulties stemming from an inability to organize in expanding industries such as trade and finance. One reason for that may be that traditional union services, such as seniority and pension plans, geared to enhance worker commitment to a single organization, may not attract workers who are mobile.

Fourth, the blend of changing environments and management industrial relations practices have hampered inter- and intra- organizational solidarity. In the auto industry, for example, Q.W.L. programs, such as pay-for-knowledge arrangements have resulted in different working conditions and pay-scales across plants. As a result, union solidarity has been threatened due to growing competition among individual workers, work groups, and plants (Katz, 1985), and due to workers being afraid that cross-training devalues their job skills, thus making them more vulnerable to lay-offs (Alster, 1989).

To sum, the first, second and third effects of environmental changes have reduced the union benefit differential, thus lowering worker incentives to belong to unions. The fourth effect has shaken union organizational foundations. These effects, in turn, have shifted the workplace balance of power toward management.

Managers may then exploit this fundamental shift in power by pursuing a broad range of strategic choices such as plant closings, introduction of new technology or investment decisions. Most unions, on the other hand, have foregone a strategic choice approach, as fewer than 50 percent of international unions engage in formal strategic planning (Stratton and Brown, 1988). Unions who are not planning may remain in an adaptive, reactionary mode rather than strategically acting on their environment. Consequently many unions may have few means with which to respond to their decline if they rely on the narrow range of options revolving around contract negotiation and administration. In other words, many private-sector unions seem to be limited by their adherence to a traditional economic paradigm of the union-management relationship (Murray and Reshef, 1988).

A PROGNOSIS?

There is nothing predestined about the relationship between trade unions and their environments. Like management, unions should engage in strategic decision making — decisions that alter a party's role or its relationship with other actors in the industrial relations system — because, like

management, unions enjoy strategic choices to the extent that environmental constraints do not severely limit their alternatives (Kochan, McKersie and Cappelli, 1984). Unions, therefore, should forecast employment changes, production trends, mergers, and public socio-economic policies, and should conduct research to assist the formulation of long-term policies (Reshef and Murray, 1988).

Furthermore, union strategic action must be preceded by a paradigmatic change (Murray and Reshef, 1988). The recent union decline may be attributable to unions' inability to adjust their economic paradigm, or world view, to changing environments. Since their inception, North American unions have adhered to an economic paradigm whose fundamental assumptions are that the employee-employer relationship is necessarily adversarial and that unions should pursue a narrow economic agenda. Now, being trapped in this paradigm, private-sector unions' institutions, agendas, and philosophies may be out of step with a changed industrial relations reality. Because their traditional economic paradigm may no longer be appropriate, unions may no longer be effective in meeting their members' traditional economic expectations. If they are unable to meet these expectations, unions may lose their major source of attractiveness to both members and potential members, hence union decline.

Scholars emphasizing the two furthermost poles of a complex process of organizational change — a new paradigm and a new action orientation — have overlooked one crucial issue: How unions are to advance from the paradigmatic orientation to direct action. This paper proposes that to bridge the paradigm-action gap, unions should engage in strategic planning.

UNIONS AND STRATEGIC PLANNING

In the past decade, a volume of research has evolved around the concept «strategic planning». Unfortunately, there has been confusion and ambiguity over the definition, use, and application of the concept. Differentiating «strategic planning» from «long-range planning» has been problematic (Mintzberg, 1973). It is generally accepted, however, that «strategic planning» implies the pursuit of a proactive, entrepreneurial tack, while «long-range planning» infers an adaptive, reactionary, defensive mode (Smart and Vertinsky, 1984), based on «extrapolation of the past» (Ansoff, Declerck and Hayes, 1976, p. 39). This confusion prompted Mintzberg (1981) to draw attention to the lack of precision in the term's definitions, and Rumelt (1979, p. 197) to refer to its use as «idiosyncratic».

Despite the definitional ambiguity and lack of consensus over what strategic planning specifically entails, an early source defines strategic planning as

> a rational analysis of the opportunities offered by environment and of the strengths and weaknesses of the firm, and selection of a match (strategy) between the two which best satisfies the objectives of the firm (Ansoff and Hayes, 1976, p. 1).

In years gone by, the term has been expanded and come to imply that decision-makers are entrepreneurial, that is aggressive, creative, risk-taking individuals who change the pattern of environment-organization linkages by identifying and developing new areas of opportunity (Rawls and Rawls, 1976; Ansoff, Declerck and Hayes, 1976; Kochan, McKersie and Cappelli, 1984). Strategic planning also has come to mean that leaders enjoy discretion over decisions, have a long-range vision of their organization, systematically formulate objectives/tactics, and rationally allocate resources to reach a desired end.

But by associating strategic planning with corporate management and business policy (e.g. Ansoff, Declerck and Hayes, 1976; Schendel and Hofer, 1979) the literature has applied the concept primarily to business organizations. The possibility of strategic planning in other organizational forms, such as trade unions, has thus been overlooked. Even Kochan, Cappelli and McKersie (1984), who have been among the first to argue that unions must develop innovative strategies, have emphasized more the impact of management strategies on changing industrial relations patterns. This, however, may be a result of unions' lack of involvement in strategic planning to the extent that management has been involved. Should strategic planning be limited to business?

We propose that union officers are able to engage in strategic planning similar to that carried out by top management of a firm. We, thus, are casting union leaders as strategic decision-makers who are able to formulate strategic plans. That is, they are acting in a proactive mode, attempting to favorably mold their changing environment to best satisfy their union's objectives.

Few unions, however, are engaging in formal strategic planning. In fact, nearly twenty years ago, Bok and Dunlop (1970, p. 186) deplored that, «[j]udged by contemporary standards of administration, the typical international union leaves much to be desired». They went on to state that unions had done little in terms of research, planning, budgeting or resource allocation. The fact that few labor organizations have reportedly engaged in strategic planning (Stratton and Brown, 1988), and that unions have frequently been urged to act strategically implies that not much has changed in

this regard during the past two decades. Meanwhile, business firms, in contrast, have been gaining expertise at such administrative tasks.

Strategy development in firms has evolved through several stages, such as conceptual logic, use of theory, shaping corporate culture or a competitive model/economic approach. It seems that unions may be lagging in their developmental approaches. Although no empirical evidence has been produced, it seems likely that unions who are engaging in strategic planning are at the conceptual logic or «muddling through» stage.

Are there any differences between union and business organizations which render union strategic planning different from business strategic planning? The classical difference often cited between unions and business is that unions are much more political in that, for instance, leaders are elected rather than hired and therefore are accountable to members. Further, the democratic internal decision-making process, a characteristic of many unions, may constrain leaders attempting to implement strategic planning. Since any strategic decision may pit one union interest group against another, intraorganizational bargaining may be necessary before leaders can implement planning. Such intraorganizational bargaining may evolve into political strife, undermine the planning, and even discourage leaders from future planning. In contrast, top executives of a firm have the ability to engage in unilateral decision-making, and need not gain the approval of constituents through the use of a democratic process. While a political or democratic orientation does not preclude strategic planning, it may inhibit both the planning and its implementation process. Overall, an uncertain environment, limited resources and democratic decision-making processes may impede union strategic planning more so than they do business planning.

Union political orientation may result in: (1) power being less concentrated in the hands of critical decision makers; (2) top leaders having a meager inventory of sanctions to overcome opposition; and (3) a plethora of interest groups having vested interest in keeping the current situation intact. Local unions, for example, may feel threatened by a strategy of whose formulation they have not been an integral part, and refuse to implement it in their own territory. In short, while any organization may fail to win its members' complete approval for a new strategy, business may be better equipped than unions to implement a strategy. Perhaps unions engaged in planning a new strategy to cope with environmental changes should, at the same time, develop a secondary strategy to market their environmental strategy to the rest of the union. Further discussion of this issue is beyond the scope of this paper, but it is important to note that union political orientation may considerably slow the planning and implementation processes.

STRATEGIC PLANNING AND UNION GROWTH

If private sector unions keep merely reacting to environmental changes and challenges, they may continue on a downward trend. Proponents of union strategic action have advised unions that if they are to survive the radical environmental challenges, they «must develop a compensating role at the top of the strategic level [of the firm], and across all levels... deliver new 'goodies'» (McKersie, 1985, p. 646). To accomplish this mission they «must integrate and make consistent all aspects of trade unionism — organization, job regulation, service delivery, political action, [and] underlying philosophy» (Reshef, 1988, p. 58).

Such claims are underlain by the twin assumptions that: (1) any union is capable of planning strategically; and (2) strategic action has an intrinsic value, that is, strategic action should result in union resurgence.

Whether the use of strategic planning does enhance organizational performance has been an unresolved question in the policy literature. Research evidence on the planning-performance link has been inconclusive. While some studies found a positive planning-performance relationship (e.g., Ansoff, Avner, Brandenburg, Portner and Radosevich, 1970; Herold, 1972; Thune and House, 1970), others failed to produce any direct evidence that strategic planning enhances organizational performance (e.g. Grinyer and Norburn, 1975; Kudla, 1980). It follows, therefore, that even if strategic planning does assist unions in linking a new paradigm to a new action orientation, there is no certainty that the latter will result in union growth.

One reason for the inconclusiveness of the strategic planning research may be that many of the corporate studies did not control for the availability and quality of organizational resources. Instead they concentrated on process (e.g. Huff and Reger, 1987) or content (e.g. Fahey and Christensen, 1986) issues. This paper, in contrast, proposes that to predict an organization's likelihood to improve performance through strategic planning, assorted organizational resources must be analyzed. In other words, it may be that not all unions are equally disposed to plan strategically and that a union resource analysis may differentiate between planners and non-planners. Such an analysis may illuminate those unions for which there is a higher likelihood that strategic planning will result in enhanced organizational performance.

The former discussion implies that for unions, organizational growth is evidence of good performance, or of the effectiveness of strategic planning. While for the firm effectiveness criteria might include things such as market

share or business performance, no commonly accepted measures of effectiveness exist for unions. Therefore, growth was chosen as an appropriate performance measure as unions must organize a large proportion of the labour force in their industry to limit an employer's ability to pursue nonunion options (Kochan, McKersie and Cappelli, 1984), and to be able to take wages out of competition, which is still a major precondition for a union's capability to effectively represent its members.

RESEARCH HYPOTHESES

It follows from the general discussion that whether a union is likely to engage in strategic planning and improve its performance rests partly upon its resources. Therefore, the following organizational resources were selected to develop preliminary research hypotheses for union strategic planning: (1) leadership capability; (2) financial assets; (3) staff; and (4) time. While these factors do not constitute an exhaustive list of organizational resources, they seem central enough to successful planning to lay the groundwork for an initial research agenda.

To ground the research hypotheses and to illustrate the use of strategic planning by local union officers, the case of the Communications Workers of America (CWA) Local 7800 is offered. CWA Local 7800 is located in the Pacific Northwest, and has a membership of about 2400 members. Over the past few years, together with other unions in the telecommunications industry, it has experienced considerable environmental changes. In the telecommunications industry, technological change, changes in regulatory policy, the 1984 AT&T divestiture, product and service diversification, newly created nonunion subsidiaries, increasing employer centralization and the ensuing collective bargaining decentralization, and increased import penetration have exacerbated competitive pressures. Consequently, worker job security and the CWA's organizational foundations have been jeopardized (Hendricks, 1987; Koch, Lewin and Sockell, 1987; Cappelli and Perry, 1986). Two immediate results of these environmental changes were: (1) The loss of some 120,000 unionized jobs between 1982 and 1985 (Hendricks, 1987, p. 130); and (2) AT&T's gain of major concessions from the CWA on wage and job classifications in return for a new retraining program in the 1986 bargaining round (Pollack, 1988).

Local 7800 confronted an additional severe challenge in 1984 when its former officers had to step down due to unprofessional conduct. As a result, the Local experienced a lack of trust on the part of its members, and suffered a loss of legitimacy in the eyes of management with whom it was dealing. Additionally, a new slate of executive officers had to be elected.

The three newly elected officers had different feelings from the past officers in terms of how to accomplish the union's objectives, which created some conflict within the union. To cope with the conflict and challenges, the three newly elected officers of the Northwest local initiated strategic planning. First, they outlined the organization's key values and goals for the near and distant future. Following that, they set a course of action designed to achieve their goals. Once these main steps were accomplished, the three officers expanded the scope of the planning group so that the vice-presidents and the entire executive board were involved (Hamilton, 1988). The following hypotheses, therefore, were inductively drawn based on observation of CWA Local 7800's experience, interviews with the local officers, and analyses of local union documents.

The first hypothesis rests on the assumption that strategic planning is a multi-layered process (Burgelman, 1983). Top management typically supplies a long-term vision of the organization, while it is middle- and lower-level management who carry out the planning process. Likewise, in trade unions, top national/international leaders should supply the vision, encouragement and inspiration needed to prompt local leaders into action, hence

H_1: that national union leaders' vision will affect the likelihood of local leaders to engage in strategic planning.

Indeed, the case of Local 7800 demonstrates the important role played by top leaders in initiating strategic planning. The local president stated that their strategic planning follows from a Morton Bahr (International CWA President) vision, and that without Bahr's support, it wouldn't work. Further, the membership does not always believe the local has ultimate authority, and that to obtain member support, the local must first demonstrate they have the support of the international union. Bahr does support the local's planning efforts, and believes that the adversarial relationship between management and the union must be put aside (Bureau of National Affairs, 1988), and that the union should be proactive in dealing with environmental changes. In responding to deregulation in the telecommunications industry, Bahr has proposed various avenues designed to keep the organization's membership from dwindling (Pollack, 1988). For example, during the CWA 1984 convention, it was stated that

> [l]ike management, the union must change its traditional reactionary style to meet future challenges in a proactive manner. Union representation must amend their role as grievance-handlers to become strategic problem-solvers. The realm of issues confronted by the union has expanded from contract interpretation and bargaining to include such complex issues as technological change, job design, and the quality of working life. This transition will require increased awareness and education within the union (Straw, 1984, p. 452).

But, the literature argues that top leaders' vision is not enough to induce local leaders to implement that vision by strategically planning. Local leaders must share the top leaders' vision, enjoy discretion over strategic decision making, and be intellectually and politically capable of carrying out strategic planning, hence

H_2: that local union leaders' willingness and knowledge will affect the likelihood of local unions to engage in strategic planning.

It is noteworthy that H_2 has several corollaries revolving around variables such as local leaders' discretion over strategic decision making, whether local leaders share the top leaders' vision, and local leaders' ability to convincingly communicate the new vision and their strategic planning to members.

In Local 7800, the president shares Bahr's vision, and follows the CWA values, as stated in the union constitution and by-laws. He, like Bahr, believes in strategic planning as a means to strengthen the organization. Additionally, he has the capability to plan strategically due to past experience as a facilitator/consultant for group meetings and organizational development techniques. In contrast, other CWA locals in the area are not engaging in planning because, according to the Local 7800 president, they do not understand strategic planning theories, and are not aware of what can be gained through engaging in such action.

The next two hypotheses are related to organizational financial and staff resources. The availability of union financial and staff resources should influence whether or not a union can afford strategic planning. It would seem that unions with a greater resource base might be more capable to initiate and execute strategic planning, hence

H_3: that the greater a union's financial resources, the greater the likelihood of the union to engage in strategic planning; and

H_4: that the greater a union's staff resources, the greater the likelihood of the union to engage in strategic planning.

Local 7800 prepares a budget every quarter, committing those resources necessary for planning. Additionally, the local has the financial resources to be able to hire consultants to direct and advise the union leaders in the strategic planning process. Planning sessions were held with the local's Executive Council, during which time the vision, values and goals of the union were clarified, a strategic plan was formulated, and a timeline enumerating tactical and budgetary details was outlined. Without the direction of the consultants, the Executive Council may not have engaged in such action.

To effectively initiate and implement strategic planning, organizational planners must also have adequate time to pursue such activities, hence

H_5: the greater the time available for union personnel to engage in strategic planning, the greater the likelihood of the union to act strategically.

One of the consultants working with Local 7800 noted that the officers felt that one roadblock to their strategic planning efforts was time constraints. According to the consultant's report, «[t]here is so much happening so quickly, that you [the union executives] feel yourselves reacting versus planning» (CWA, 1988, p. 2).

In sum, leader attributes such as vision, willingness and knowledge, as well as organizational resources such as financial assets, staff support, and time all seem to be key elements in the capability of the Northwest local union to develop strategic plans.

DISCUSSION

Union leaders must begin to act as strategic planners outside the structure of corporate management if they are to move from a new paradigm to a new action orientation. Not all unions, however, may be as likely to engage in such action if their organizational resources are lacking. As illustrated by the case of CWA Local 7800, the presence of certain elements seems necessary in order for strategic planning to occur.

Research beyond a single example is needed on unions who are attempting to act strategically. First, it should be determined if leader attributes and organizational resources actually do underlie the planning process. Second, the issue of the impact of strategic planning on organizational prosperity must be resolved. While the planning-performance relationship was not the focus of this study, various references to the effectiveness of the planning process were made throughout the course of this paper. Consequently, this seems to present a fruitful area for further data gathering and analysis.

Another relevant area not covered by this paper is what factors determine and catalyze union strategic planning. It is possible, for example, that unions that are capable of securing better working conditions for members by employing traditional institutions, such as collective bargaining and strikes, will be less likely to engage in strategic planning. According to the above hypotheses, however, these unions may also be the most likely to initiate strategic planning since they enjoy a stable, and perhaps even growing, resource base. This is not to say that declining unions will not

engage in strategic planning. What it does say is that there may be a critical point below which it may become more difficult, if not impossible, for unions to initiate strategic planning due to a lack of organizational resources. Unions, therefore, should be aware of the possible consequences of waiting until they reach that point of no return.

The results of such research should be applicable not only to industrial relations but to organizational studies in general. If it can be determined that resources are key to strategic planning, and that there is a link between planning and performance when resources are controlled, a contribution may be made to the general area of organizational analysis.

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Les syndicats du secteur privé et la planification stratégique

Alors que la mise en place de stratégies de développement dans les entreprises a beaucoup retenu l'attention, peu de syndicats en Amérique du Nord se sont engagés dans la planification stratégique formelle en mettant l'accent sur la planification au sein des syndicats en tant qu'organisation. Pour enrayer l'érosion de la position du syndicalisme dans les années qui viennent, les syndicats devront mettre en oeuvre un processus stratégique de décisions ou des décisions qui modifient le rôle d'une partie ou ses relations avec les autres secteurs à l'intérieur du régime des relations professionnelles.

De plus, les dirigeants syndicaux sont capables de s'engager dans une planification stratégique comparable à celle que les cadres supérieurs ont établie dans les entreprises. Les dirigeants doivent être plus actifs en s'efforçant de modeler leur milieu de façon à mieux répondre aux objectifs de leur syndicat.

Même si tous les dirigeants syndicaux peuvent reconnaître que la planification stratégique est souhaitable, la décision de s'y engager dépend en partie des ressources de leur syndicat. Ainsi, en se fondant sur l'exemple clair d'une section locale du Syndicat des travailleurs en communication, voici cinq hypothèses de recherche ayant pour objet la nécessité de ressources organisationnelles:

Première hypothèse: la vision des dirigeants du syndicat national aura un effet sur la probabilité que les dirigeants locaux investissent dans la planification stratégique.

Deuxième hypothèse: la volonté et les connaissances des dirigeants locaux auront un effet sur la possibilité pour les sections locales de s'engager dans la planification stratégique.

Troisième hypothèse: plus les ressources financières du syndicat sont considérables, plus la probabilité est grande que le syndicat investisse dans la planification stratégique.

Quatrième hypothèse: plus les ressources humaines du syndicat sont nombreuses, plus est grande la probabilité que le syndicat se lance dans la planification stratégique.

Cinquième hypothèse: plus le personnel du syndicat dispose de temps pour s'engager dans la planification stratégique, plus il est probable que le syndicat aille de l'avant.

En général, les qualités des dirigeants, comme la vision de l'avenir, la volonté et les connaissances, ainsi que les ressources de l'organisation — actifs du syndicat, appui des employés et disponibilité de temps — semblent être les éléments principaux permettant à une section locale de développer des plans stratégiques.