



Workplace Empowerment and Disempowerment: What Makes Union Delegates Feel Strong?

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Abstract

This study of workplace union delegates in the education sector identifies a typology of the experience of workplace union representatives according to their assessment of their degree of influence in their workplace and their union and their degree of control over their work as a union representative. When combined, these two assessments yield different types of disempowerment and empowerment. While workplace context plays an important role in delegates' degree of control, their influence in the workplace and union is strongly associated with different types of power resources (internal and external networks) and strategic capabilities (learning and articulating or bridging). Unions seeking to increase workplace representative influence should therefore look to the reinforcement of delegates' power resources and strategic capabilities while looking at how to reinforce their ability to deal with more difficult contexts associated with feeling a loss of control.

Keywords

workplace union delegate, shop steward, new public management, empowerment, disempowerment, union renewal, union democracy, power, resources, capabilities, education sector

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This article asks what makes workplace union delegates feel strong. The workplace union delegate is a basic building block for union organizations. Shop stewards or workplace reps or union delegates, as they can be called interchangeably according to industry and profession,¹ can be elected by union members or appointed by the union or often just come to be a delegate because no one else is willing to undertake the task. Delegates play a range of roles from handling initial steps in grievance procedures and representing workers to local management to playing a broader organizing, education, and political roles on behalf of the union (Roby 1995). Workplace delegates also play an important two-way role within union structures: they represent their members within broader union structures and policy-making; they also present union policies and strategies to the membership. Workplace union delegates are a lynchpin for many renewal strategies predicated on either strengthening or modifying the role of delegates in order to revitalize servicing and organizing strategies (Murray et al. 2013). Yet there are remarkably few contextualized studies that seek to take account of the different influences and constraints on the roles that delegates play in their workplace.

We focus on the public sector because of a unique partnership between our research team and one of the major unions in the public sector in the province of Quebec, Canada. The federation of teaching unions (FSE or *Fédération des syndicats de l'enseignement*) has traditionally engaged in two-tier bargaining with the state-level (provincial) union conducting centralized bargaining for all of its members while its component regional unions negotiate second-tier agreements on a separate range of issues with school boards (districts) covering multiple schools in a geographical area. The FSE faces increasing devolution of management responsibility to the level of individual schools, leading to a partial shift in union servicing from full-time staff (sometimes appointed professionals and sometimes full-time released lay officers) to workplace delegates. These delegates ensure the application of the collective agreement negotiated at other levels, opening up new spaces for bargaining with local managers at the level of the individual school, while continuing to carry the union message to union members. This enlarged mandate contrasts with the traditionally more passive role of the union delegate. Yet many FSE and regional component union officers and staff remain uncertain about the ability of their workplace delegates to take up this challenge. That's how our research team came to focus on what delegates actually do and whether and why they feel empowered or disempowered.

The experience reported here is hardly unique to the FSE. The "new public management" (NPM) is a trend faced by many public-sector employees. Originating in the liberal-market Anglo-Saxon countries such as the United States and the United Kingdom, and driven by neoliberal and austerity pressures on public spending, NPM's focus on cost reduction and the optimization of performance has extended into most developed economies (Bordogna 2008; Lapsley 2009; Siltala 2013). NPM exerts cascading effects on work organization and labor relations, with workplace union delegates on the front line of change. The question is whether workplace representatives are equipped to handle this change. This is especially important where collective bargaining rights are also under threat (for U.S. examples, see Lichtenstein 2011; Cantin 2012) as the empowerment or disempowerment of front-line union representatives is critical for union mobilization strategies.

After reviewing the impact of changes in the management of the public sector on union strategies and workplace union delegates, we develop an empirical typology of workplace union delegates. This typology classifies the experience of delegates in the Quebec education sector, highlighting how some delegates feel empowered whereas others feel disempowered. We then explore the factors that are associated with these different types of delegate experience. While workplace context plays an important role, the ways in which these resources and capabilities interact with different local contexts yield different types of empowerment and disempowerment. These results have important implications for unions seeking to understand the impact of change on their workplace representatives and how different strategies contribute to the development of more effective networks of workplace representatives.

The NPM and Union Strategies

The restructuring of public services over the last two decades in most Western countries challenges traditional modes of management and organization of services. NPM seeks to apply results-based accountability from the private sector to the management of public services (Diefenbach 2009; Bordogna 2008; Bach and Givan 2011; Siltala 2013). The NPM discourse is readily familiar to those working in the public sector: introduction of more explicit, formal, and quantifiable performance standards; control centered on results rather than on processes; the reorganization and breaking up of organizational units, most often carried out together with privatization; the use of competitive bidding for supply through internal markets; the adoption of private-sector managerial styles; and greater discipline in resource utilization (Bordogna 2008, 383).

NPM typically entails a dual movement in decision making. First, the setting of objectives and control mechanisms, especially financial, is centralized in state agencies (Bessette and Boutin 2010). Second, at the same time, the decentralization of some powers and processes to the workplace invests greater discretion in local managers as to how to achieve targets set centrally. The objectives pursued in this simultaneous centralization and decentralization are all the more complex because they are often contradictory, involve new actors and “clients” at different levels, and shift in the light of competing political demands (including those of the new actors), thus giving rise to very uneven effects (Diefenbach 2009; Jeannot and Rouban 2009; Lapsley 2009; Thörnqvist 2007).

Moreover, this dual movement poses difficult strategic issues for unions. Since increased centralization removes many issues from the bargaining table, unions need to develop political and community strategies that can influence these decisions beyond the immediate sphere of collective bargaining (see Camfield 2007). Yet decentralization places local managers at the center of a workplace change process. This raises the question of the capacity of union organizations and, in particular, their workplace reps to deal locally with the restructuring of workplace processes.

Many public-sector unions have historically been relatively centralized at regional or state (provincial) levels. Reflecting the management structures with which they dealt, their trade union models were often bureaucratic and typically did not entail

robust representative structures at the level of the workplace. Indeed, the democratic life of the union has typically been external to the workplace (Camfield 2007). This is a source of weakness when the new strategic challenge is how to occupy greater space at the local or workplace level where these NPM processes are being implemented. Many public-sector unions have engaged in change projects: reexamining their repertoires of action, reallocating responsibilities among their different components, and seeking to enhance their capacity to take action in the workplace (Roles, O'Donnell, and Fairbrother 2012).

At the same time, steward experience suggests that increased performance pressures in the workplace also make the conditions to engage in union activity all the more difficult for potential union activists (Bach and Givan 2008, 536-37). Work intensification, increasing precariousness, the proliferation of different categories of public-sector worker, and a greater emphasis on professional identities as part of the managerial equation are just some of the forces associated with NPM and making workplaces altogether more volatile for union action (Lévesque, Murray, and Le Queux 2005; Dufour and Hege 2010; Peetz 2010; Le Capitaine 2011).

Challenges for Workplace Union Delegates

An extensive literature points to the importance of workplace union delegates for union renewal but also highlights the complexity of this challenge. Classic studies of workplace delegates emphasize the diversity of approaches taken by workplace delegates (for example, Sayles and Strauss 1967 for the United States; Batstone, Boraston, and Frenkel 1977 for the United Kingdom). Some delegates play a rather passive role; others engage in bargaining and problem solving. Recent studies contrast more passive workplace delegates who see themselves primarily as a liaison between the union, its members, and the employer and more active delegates who focus their attention on recruiting activists, fostering member participation, and developing a broader agenda for social change (Chang 2005). This enlarged, empowered role is the focus of many union renewal strategies because it is part of a larger approach to building workplace power. This is easier said than done, however, as empirical studies report considerable variation in the capacity of workplace delegates to mobilize their resources and make strategic choices in the face of difficult circumstances (Dufour and Hege 2002; Lévesque and Murray 2002; Frege and Kelly 2003, 7; Richards 2006; Murray et al. 2010).

The propensity of workplace delegates to play a more active role appears to be associated with both the capabilities of the delegates themselves and with union policies and practices. Several studies have emphasized the importance of formal and informal exchanges between members and workplace delegates (McBride 2004; Nissen and Jarley 2005). Other studies have focused on the socio-biographical trajectory of workplace delegates, in particular their belonging to social movements (Ganz et al. 2004). Other recent studies have highlighted the gendered and racialized nature of local steward representation and the need for specific recognition of these sources of inequality and identity (Bryant-Anderson and Roby 2012; Cranford 2012). They

also point to the importance of cross-constituency organizing, that is, “coalition-building inside unions between and across equity-seeking groups,” for a local leadership renewal able to draw on a broader range of experience at work by addressing intersectional inequalities (Briskin 2011, 523). Finally, yet other studies point to the importance of delegate training (Wallis, Stuart, and Greenwood 2005) and, in particular, union education on broader social issues (Peetz and Pocock 2009; Peetz and Alexander 2013).

This construction of the capacity of workplace delegates to play a more active role reflects their power resources. In this study, we focus on two kinds of power resources. First, *internal solidarity* refers to the means that a workplace union has at its disposal to preserve collective cohesion and deliberative vitality among its members. This includes mechanisms such as the extent of information exchange and networks. The workplace delegate can draw on this resource to construct her or his power. Second, *network embeddedness* (or external solidarity) refers to the external links (vertical and horizontal) that delegates have with their own union, other unions, and social groups. Delegates embedded in thick or extensive external networks with strong ties can potentially play a more active role (Lévesque and Murray 2010, 339).

To use these resources judiciously, workplace delegates must also have strategic capabilities. The contention is that delegates not only must be able to draw on resources but must also have the capabilities or social skills to activate those resources (Lévesque and Murray 2010). Strategic capabilities are “sets of aptitudes, competencies, abilities, social skills and know-how that can be developed, transmitted and learned” (Lévesque and Murray 2010, 341). *Articulating capabilities* refers to the link between different levels and types of union action across space and time. For example, a delegate might bridge different roles, such as dealing with managers on behalf of his or her members while also promoting larger union objectives and purposes to workers and participating in that broader union mission. Learning capabilities relate to the accumulation, articulation, and codification of knowledge derived from reflection upon past experiences (Zollo and Winter 2002). These can take different forms from the accumulation of experience, to training, and to the codification of knowledge. Both Ganz (2000) and Hyman (2007) emphasize how essential learning is to adaptation and innovation.

In this study, we examine whether and how these power resources and strategic capabilities intertwine in different contexts. We contend that workplace union delegates who exhibit greater power resources and strategic capabilities are more likely to be empowered when faced with changes associated with NPM. The ways in which they do so are of considerable importance for union renewal strategies.

NPM and Workplace Change in the Education Sector in Quebec

The education sector in Canada has undergone numerous managerial changes (Lessard 2006) that reflect NPM in other countries. Three trends in the Quebec education sector, which has undergone successive reorganizations (Proulx 2007, 136), illustrate this broader phenomenon.

First, increased “benchmarking” to improve performance has been a central objective for educational institutions. The growing importance of surveys—both local and international—illustrates how school systems are led to compare “results.” For example, the international PISA survey (Programme for International Student Assessment) conducted with students from member-countries of the Organization for Economic Cooperation and Development (Bessette and Boutin 2010, 51) is used to compare provincial results in Canada. With the move towards increased parental choice within school districts, surveys are also used to highlight relative advantage in the “competition” for students.

Second, the centralization of control mechanisms such as funding and standardized assessment and the decentralization of other more process-based decisions has reduced the space for intermediary bodies, leading to a significant reduction in the number of school boards (districts). The broader trend towards decentralization has also led to the creation of a governing board in individual schools, which is made up of different actors (school principals, teachers, nonteaching professional staff, support staff, parent representatives, secondary school students, etc.). These governing boards make decisions on local educational projects and initiatives (Després-Poirier 1999; Lapointe et al. 2009). This is a major change because school principals exercise more power (Lessard 2006). Workplace union delegates are not included in this new representative structure, though the representation of teaching staff can mean that a delegate can play a *de facto* role if he or she is designated as the staff rep in this body.

Last, the role of “external” actors is now more evident in the governance of schools. Private firms have sought to carve out a niche in a variety of areas, such as food services and technical training. By virtue of their presence on the governing boards, parents have also become more involved in the school system. This increased heterogeneity of actors contrasts sharply with the model of professional bureaucracy which had hitherto dominated local school governance and often gives rise to competing objectives and perspectives among the different groups at play. Workplace union delegates now have to deal with a wider variety of actors in school governance than was previously the case.

Teachers’ Unionism in the Quebec Education Sector and Study Methodology

Our study of workplace delegates was conducted in partnership with the FSE. This union organization is affiliated with one of three major union federations (central labor organizations) in the province of Quebec, the Centrale des syndicats du Québec (CSQ), which includes over 180,000 members. The FSE currently has 36 regional unions representing nearly 60,000 teachers in French-speaking school boards or districts across the province.

Teachers in this sector are all unionized. There are three levels of bargaining of which two are formal and one is informal. In first-tier province-wide bargaining, wages and benefits are negotiated centrally with the provincial state for all members of the union federation, which covers all teachers. Union officials in our study recount

how much of what they used to bargain at the central level has simply been removed from the table in favor of centralized nonnegotiable guidelines emanating from state, provincial, and national governments. In linked second-tier bargaining, job mobility and other local considerations are then negotiated between regional unions of the same federation and regional school boards or districts. Most conditions of employment relate to a collective agreement signed at one of these two tiers. More informally, there is increasingly a degree of autonomy on some issues that is devolved to individual schools and their local managers (school principals). This opens up a new space for union delegates. As expressed by one influential president of a regional union,

The issue of decentralization is not simple. ... We have the tools and the people in the workplace but they don't have a union reflex and we cannot be there to help them when they are having problems. ... The background issue for all of our union training initiatives is how to develop strategies to deal with the question of decentralization and how to force the employer to be a more acceptable employer.²

Our study of workplace delegates involved five steps. We first conducted exploratory interviews with representatives from five regional unions in order to understand better the trends at play. Quotes from officers and delegates in this article result from this phase of the study. Second, we designed a questionnaire on workplace change and the role of the union delegates in their workplace and union. The questionnaire comprised 338 questions dealing with the characteristics of workplaces and work organization (81 questions), union life in the school (119 questions), local labor relations (60 questions), the values and priorities of workplace delegates (65 questions), the profile of the respondent (30 questions), and a possibility to identify other salient issues. We also conducted pretests with workplace delegates in five different regional unions. Third, the questionnaire was mailed to the entire population of workplace delegates in the union federations (one questionnaire to each of 2,260 schools identified by the regional FSE component unions). At the end of data collection and recall periods, 1,105 questionnaires were received for a response rate of 49 percent. This relatively high response rate is all the more remarkable since the questionnaire took a minimum of two hours to complete and could take more time when several delegates participated in crafting the response of their school to the questionnaire. Fourth, we engaged in extensive retroaction and discussion of the results with the union federation and its officers, staff, and delegates at different levels and in various forums. Finally, we also conducted a study of the regional unions to which these workplace delegates belong. This article does not present the results of this linked study of the regional unions in the education sector.

Our study offers an unusually comprehensive portrait of workplace delegates, in terms of both the range of issues investigated and the diversity of responses coming from delegates. The detailed nature of the survey provides a unique and comparable portrait of the experience of these workplace delegates and the contexts in which they fulfill their duties. It would be difficult to obtain such richly contextualized data in any other way. For example, many of the delegates who responded to our survey were

teachers who had *never* participated in union activities at other levels of the union, nor *ever* taken a course in a union education program: they were operating “under the radar.” Despite our reliance on workplace respondents to report their own experience and the risk of single-respondent perceptions, the range and breadth of the delegate responses, the involvement of a diversity of delegates in terms of their commitment to the union and their life experiences, and the contextualization of the results both prior to and after the administration of the survey suggest a quite unique tool for understanding the experience of workplace delegates.

The CSQ and its major component federation, the FSE, are engaged in a wide range of coalition- and union-building activities and open to collaboration with other unions in the promotion of public services and progressive social issue campaigns. This was immediately apparent in the results of the survey of delegates. For example, 77.1 percent of respondents indicated that they had been on strike, 93.3 percent had participated in a union demonstration, and 62.8 percent some other kind of demonstration. However, it’s also fair to say that the union’s relatively high degree of militancy is tempered by the strong pull of professional issues on its activists. When asked what kinds of activities would push them to invest more time in their role as a workplace delegate, 80 percent identified, as a first priority, professional issues related to the job of a teacher, whereas the first priority was collective bargaining issues for just 14 percent of respondents and sociopolitical issues such as the promotion of a public education system for only 6 percent of respondents. The union’s militancy on professional issues, however, points to a strategic acumen in mobilizing this membership interest to advance these professional concerns. For example, over recent central bargaining rounds, when it was more difficult to make gains in wages and benefits, the union has made significant gains on negotiating reduced class size, the addition of specialist resources for increasingly heterogeneous classes, and pay equity in terms of the career structure of its women members.

Space constraints limit the descriptive presentation of the respondents to the bare essentials: 66.1 percent are women; only 1.1 percent identified themselves as being from a visible minority or a cultural community, and 1.9 percent reported that they were born outside of Canada; almost all (99.5 percent) have at least one university degree; most (86.7 percent) have full-time regular employment as a teacher; 71.7 percent have more than 10 years’ experience as a teacher; 71.6 percent teach in primary (elementary) schools; 56.6 percent have been located in their current school for more than 5 years; and 56.7 percent of respondents have been a union delegate for 2 years or more.

In an effort to make the presentation of the results as transparent and reader friendly as possible, Table 1 provides detailed information on the variables used to gauge the experience and context of the workplace delegates, and Appendix 1 gives their means and standard deviations.

What Do Workplace Union Delegates Do?

As workplace managers take on an enhanced role in decision-making and performance management, workplace union delegates are increasingly on the front line. A key

Table 1. Description of Variables in This Analysis: Experience of Workplace Delegates, Workplace Context, Power Resources, and Strategic Capabilities of Workplace Union Delegates.

Experience of workplace union delegates	
Delegate influence (1-5)	Index of the influence felt by delegates in their workplace and in their union based on the extent of agreement and disagreement ³ with the following five indicators (Cronbach's alpha = .772): their appreciation of the work, their possibility to fully develop their capabilities, their perception of having influence on what goes on at work, their feeling of being really involved in the union's activities, and whether they attempt to implement union policies and orientations (1 = <i>weak</i> , 5 = <i>strong</i>)
Delegate control (1-5)	Index of the control felt by delegates in their role as delegates based on the extent of agreement and disagreement with the following five indicators (Cronbach's alpha = .773): their relative difficulty in balancing their work as a workplace delegate and as a teacher, the extent to which their work as a delegate places them in conflict-ridden situations, whether their delegate work requires too much personal and emotional investment, whether they feel overwhelmed by their work as a workplace delegate, and whether their union has so many ongoing campaigns and initiatives that it is difficult for them to establish priorities for action (1 = <i>weak</i> , 5 = <i>strong</i>)
Workplace context	
Educational institution	Identification of educational institutions by elementary (primary) school (= 1) or secondary (high) school or other (adult education and vocational training centers) (= 0)
Workplace constraints (1-5)	Measure of the experience of workplace constraints based on the extent of agreement or disagreement with the six following statements (Cronbach's alpha = .726): <ul style="list-style-type: none"> - Many teachers would leave their profession if they could - Pressure to meet the Ministry's standards is very strong - Pressure to broaden the range of tasks of teachers is very strong - Burnout is a major problem - Teachers have difficulty taking leave to deal with family emergencies, such as their children or parents' illness - Teachers have difficulty adapting the Ministry's standards to take account of students' particular needs (1 = <i>weak</i> , 5 = <i>strong</i>)
Arbitrary behavior of school administration (1-5)	Index of the extent of arbitrary behavior on the part of the school administration based on of the extent of agreement or disagreement with the following statements (Cronbach's alpha = .703). The school administration: <ul style="list-style-type: none"> - Often makes arbitrary decisions that go against the collective agreement - Applies directives of the Ministry and the school board without judgment - Closely monitors teachers' number of hours of presence in the school - Curbs pedagogical innovations initiated by teachers (1 = <i>not arbitrary</i> , 5 = <i>very arbitrary</i>)
Open attitude of school administration (1-5)	Index of the openness of the school administration to a union role in the workplace based on the extent of agreement or disagreement with the following statements (Cronbach's alpha = .854). The school administration: <ul style="list-style-type: none"> - Shares with the workplace delegates information from the school board - Trusts the workplace delegates - Seeks to involve workplace delegates in decisions (1 = <i>not open</i> , 5 = <i>very open</i>)

Table 1. (continued)

Power resources of workplace delegates	
Intensity of information exchange with members (2-6)	Index of the frequency with which teachers in their school use individual or small-group meetings with the workplace delegates and with their union representative to obtain information on the actions and orientations of the different levels of their union (<i>never</i> = 1, <i>from time to time</i> = 2, <i>often</i> = 3)
Internal network of workplace delegates (0-14)	Index of the extent of delegates' internal network as measured by the usefulness (<i>not useful</i> = 0, <i>useful</i> = 1, <i>very useful</i> = 2) of different groups of interlocutors in their establishment to do their job as a union delegate: the previous union delegate, the school administration, parent representatives, colleagues, the union staffer, some other person in the union, some other person from their entourage outside the school (Cronbach's alpha = .502)
External network of workplace delegates (4-16)	Index of the frequency of contacts or information exchange (<i>never</i> = 1, <i>rarely</i> = 2, <i>sometimes</i> = 3, <i>often</i> = 4) of the workplace delegate(s) with other groups beyond their union in the workplace: delegates and representatives of other categories of staff in their establishment, delegates from other schools in their regional union, delegates from other schools in other regional unions, and representatives of social groups or community organizations (Cronbach's alpha = .614)
Participation of workplace delegates in union bodies (3-12)	Index of the frequency of participation (<i>never</i> = 1, <i>rarely</i> = 2, <i>often</i> = 3, <i>always</i> = 4) of workplace delegates in delegate meetings of their regional union, in the annual meeting of their regional union or in the congress of the parent union federation.
Strategic capabilities of workplace delegates	
Experience (1-4)	Index of the degree of experience of workplace delegates based on their number of years of experience as a workplace delegate in their current school and their previous experience in other schools: less than two years' experience as a workplace delegate (= 1), less than two years as a workplace delegate in the current school and previous experience (= 2), two years or more as a workplace delegate in the current school without previous experience (= 3), two years and more as a workplace delegate in the current school and previous experience as a workplace delegate (= 4)
Union training (1-3)	Index of the extent of training received by the workplace delegates: none (= 1), training on either the role of the workplace delegate or some other type of union training (= 2), training on both the role of workplace delegate and other type(s) of union training (= 3)
Knowledge of workplace delegates (1-4)	Index of the level of knowledge of four different areas of union activity (<i>none</i> = 1, <i>little</i> = 2, <i>some</i> = 3, <i>very good</i> = 4): the content of the local and of the sector collective agreements, the policies and orientations of their local union and of their sector/national union (Cronbach's alpha = .793)
Relay role (0-1)	Relay role (<i>weak</i> = 0, <i>strong</i> = 1) of workplace delegates: encouraging teachers to participate in demonstrations and participating in Fédération des syndicats de l'enseignement or Centrale des syndicats du Québec campaigns to promote public education
Representation role (0-1)	Representation role (<i>weak</i> = 0, <i>strong</i> = 1) of workplace delegates: meeting the school administration to resolve teachers' problems or complaints and ensuring respect of the collective agreement

question for unions concerns their ability to cope with this shift in the locus of power towards the level of the establishment or school. Whereas the problem of arbitrary management behavior has long been on the agenda, in the words of one local union

leader, the greater discretion afforded to local managers in schools opens up the floodgates for individualism, to the detriment of collective solutions: "Individualism means that members are going directly to the school manager to try to have their little privilege and the delegate, who is more collectively oriented and is trying to make the collective agreement works in this context, ends up playing a mediating role." This is also the case, other activists report, with another NPM innovation, the introduction of parent-teacher councils with decision-making authority at the level of the school. As another local union leader noted, "With the introduction of school councils, there's a lot more do to, many propositions to put forward." Many report that delegates are not necessarily equipped to respond to this new environment and often feel isolated, even discouraged: "with the high turnover in schools, delegates sometimes report that it is discouraging 'there's no longer anyone with a union reflex, I'm on my own, it's discouraging.'" In contrast, our interview material also pointed to delegates who are able to navigate in this more turbulent environment, able to mobilize information, to create a sense of collectivity among members in their workplace and thereby exert an effective counterweight and influence local managers towards better behavior!

Our study therefore sought to understand the greater or lesser capacity of these workplace delegates to take on the roles thrust upon them by the NPM. Drawing on detailed analysis of the experience recounted by the 1,105 workplace union delegates participating in our survey, we were able to construct two indices corresponding to two different dimensions of their experience as delegates.⁴

The first index concerns the *influence* that delegates feel they exert in both their workplace and union. This is of course a key dimension of empowerment in union work though we actually know relatively little about how delegates assess this aspect of their experience. Our index combines five interrelated questions concerning the work of union delegates: their relative enjoyment of the work, the possibility that it gives them the opportunity to fully develop their capabilities, their perception that they have an influence on what goes on at work, their feeling of being really involved in the union's activities, and whether or not they attempt to implement union policies and orientations. This dimension of the delegate experience differentiates those who feel that they have influence in their workplace and union on an ongoing basis from those who do not.

The second index concerns the subjective experience of what we label the *control* felt by union delegates in exercising their role. This index combines five questions: the relative difficulty in balancing work as a delegate and as a teacher (i.e., the union-profession interface that is so central to teacher unionism), the extent to which their work as a delegate places them in conflict-ridden situations, whether their delegate work requires *too* much personal and emotional investment, whether they feel overwhelmed by their work as a delegate, and whether their union has so many ongoing campaigns and initiatives that it is difficult for them to establish priorities for their work. These five items differentiate workplace delegates who feel in control of the ups and downs of their representative role from those who have difficulty in dealing with them. This empirical finding is especially significant because a sentiment of weak control, often under increasingly difficult working conditions, speaks to the difficulty

for workplace unions to engage their membership in leadership roles. This is of course the core premise of so much of the “organizing” literature on union renewal.

Discussions with union activists certainly confirm that relative influence and control (as captured by the factor analysis of a wide range of questions on the experience of workplace delegates) are two important dimensions of the union delegate experience. Influential delegates, as one delegate put it, are leaders in their workplace. In contrast, delegates who score weakly on the control index are more likely to feel alone, to be overwhelmed by what they have to do. As one delegate expressed the impact of decentralization and the new governance bodies in her school, “it brings more work, both as a teacher and as union delegate, with the individualism as well.” Or as another summed up this new dynamic, “you can now get people together and make a proposal to your boss. It’s no longer a question of just opposing and that’s a real shock. But this also means that there’s so much more to do: you have to bring forward propositions and when things go badly with the parents, for example, you need to rethink those propositions. When the dispute worsens, you really wonder how you will get out of this.”

Since these two indices (influence and control) present different dimensions of the experience of union workplace delegates, we then combined them to create an empirically derived typology of the experience of the workplace union delegates. The empirical intuition, and the originality of the construction, is the need to understand the intersection between relative influence and control in the delegate experience. The key point that emerges from our analysis is that these two dimensions often represent different facets of the delegate experience. If they simply moved together along a single continuum, there would not be a need to differentiate between influence and control as those who feel they exert little influence would also feel a lack of control and vice versa. However, the delegates in our study are fairly evenly distributed among the four different types of delegate experience presented in our typology. This important finding highlights the need to understand how these two dimensions of delegate experience intersect in particular configurations of the delegate experience. Figure 1 shows their distribution in a four-cell matrix. We give a name to each type of union delegate experience in order to facilitate understanding.

Powerless (23 percent of respondents). The powerless delegates represent the worst of all worlds. They feel that they do not exert much influence, and they also experience difficulty in dealing with their role as a union delegate because of their lack of control.

Disengaged (29 percent of respondents). Disengaged workplace delegates also feel that they do not exert much influence in either their workplace or their union. However, they also do not experience particular difficulty in dealing with their union work.

Influential but precarious control (20 percent of respondents). Influential but precarious control represents a first type of empowerment. These workplace delegates feel that they exert influence in their workplace and union, but they also report difficulty in fulfilling their union role in terms of their degree of control.

Powerful (28 percent of respondents). Powerful delegates represent the most empowered scenario. These workplace delegates feel that they exert influence in their workplace and union, and they also report that they feel in control of their union work.

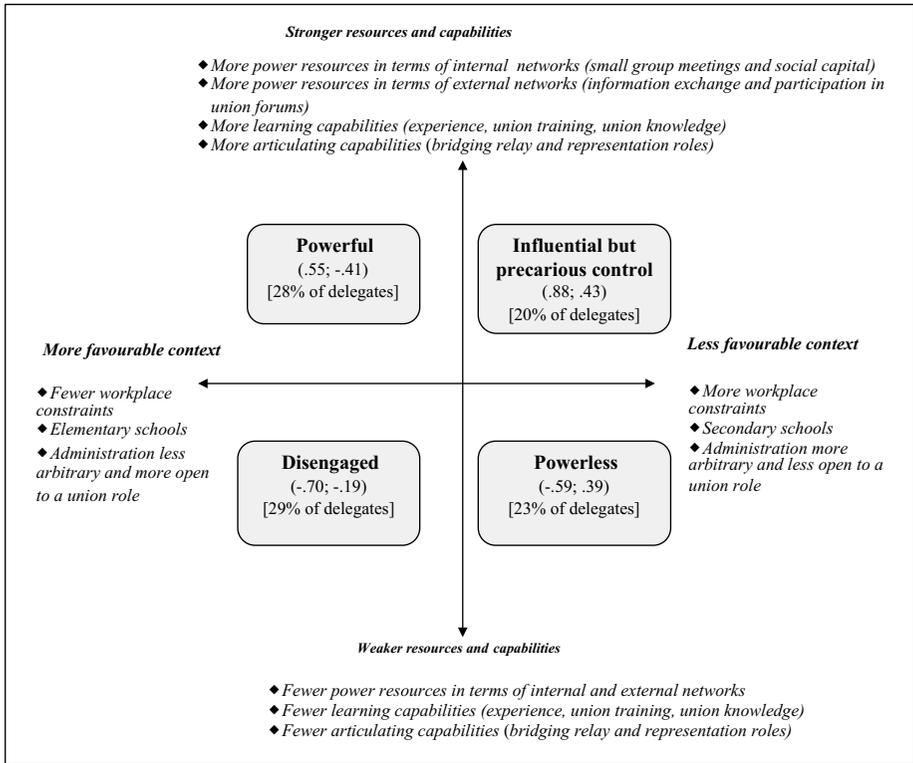


Figure 1. Factors Explaining the Type of Workplace Union Delegate Experience (Degree of Influence and Control).

The experience of the 1,105 delegates in our study therefore suggests that there is a range of experience along two dimensions: influence and control. This finding is significant because nearly half of respondents (49 percent) did not correspond to a simple representation of empowerment or disempowerment. Their experience is more varied than a more conventional account of empowerment would suggest. We therefore identify two types of empowerment, one associated with both influence and control and the other with influence but not with control. We further identify two types of disempowerment where some delegates exert little influence but do not experience problems of control and other delegates feel quite powerless in terms of both influence and control. We now turn to an explanation of the factors associated with these different kinds of experience.

Explaining the Experience (Influence and Control) of Workplace Union Delegates

In order to better understand each of these types of union delegate experience, we conducted a multivariate analysis that takes account of different types of factors. For

ease of reading, we limit statistical reporting to Appendices 1 and 2 and focus on the key results. The four types of delegate experience (two types of empowerment: *Powerful* and *Influential but precarious control*, and two types of disempowerment: *Powerless* and *Disengaged*) are treated as dependent variables. The key question is which factors (independent variables) are associated with these types of workplace delegate experience.

Discriminant analysis allows us to analyze the simultaneous effects of different types of workplace context and the power resources and strategic capabilities available to each union delegate. In other words, it indicates the factors associated with movement along each of two dimensions or axes of our typology (see Figure 1). All the variables reported are statistically “significant” in explaining the experience of these workplace delegates.

Since a number of recent studies point to the importance of gender in the experience of union delegates (Briskin 2011; Bryant-Anderson and Roby 2012; Cranford 2012), we also sought to evaluate the robustness of our results in this respect. Drawing on Figart’s fascinating challenge, the relevant question for our data is not whether gender is a significant variable, provocatively expressed as “gender as a dummy variable” (Figart 1997, 3), but rather whether the mechanics of the explanation that we identify through our analysis from the sample as a whole applies equally to the experience of both female and male workplace delegates. This is in fact the case. We conducted separate multivariate analysis for the sample of female delegates and that of male delegates and the pattern of factors associated with feelings of control and feelings of influence are similar for both female and male delegates.⁵

In the following pages we first identify the two sets of factors that are linked to the experience of workplace union delegates: the workplace context and their power resources and strategic capabilities. We then consider the implications of how these factors combine to determine different types of delegate experience.⁶

More Favorable or More Adverse Context

Our results indicate that the context in which workplace delegates take action (the horizontal axis in Figure 1) is associated with their relative feeling of control, that is, delegates who feel powerful or disengaged. In other words, context influences the feeling of control but not that of relative influence. As can be seen from the movement along the horizontal axis in Figure 1, workplace delegates who are low on the index of control in their work as union delegates are more likely to work in a less favorable context. Returning to the component indicators of the index of control, these delegates are more likely to experience problems balancing their work as a workplace delegate and as a teacher, to face conflict-ridden situations in their workplace, to feel that their work as a delegate requires too much personal and emotional investment, to feel overwhelmed by their work as a workplace delegate, and to indicate that their union has so many ongoing campaigns and initiatives that it is difficult for them to establish priorities for action.

Our analysis identifies three factors that characterize an adverse context and are associated with feeling a lack of control. First, these delegates are more likely to be in

much larger secondary (or high) schools than in the smaller primary (or elementary) schools. Second, constraints are stronger. Delegates are more likely to assess that teachers would leave the profession if they could, there are strong pressures to broaden the range of tasks accomplished by teachers, it is difficult to take time off to deal with family emergencies, there are strong pressures to meet Education Ministry standards, it is difficult to adapt these standards to take account of particular student needs, and burnout is a major problem. Third, in the adverse contexts, the school principal or management team is more likely to exhibit an arbitrary pattern of behavior and to be less open to a union role in the school. Delegates thus report that the local managers often make arbitrary decisions running counter to the collective agreement, apply Ministry and school board directives without discernment, closely monitor teachers' hours of presence in the school, and curb pedagogical innovations initiated by teachers. As regards management's openness to a union role in the school, respondents indicate that managers are less likely to share information with workplace union delegates, to trust these delegates, and to seek to involve them in the decision-making process. These three sets of factors reinforce each other and are associated with an overall lack of control. Delegates reporting a favorable context present a mirror image of these three factors and are also less likely to feel a lack of control. Overall, our results point to the importance of context for the feeling of greater or lesser workplace delegate control.

Stronger or Weaker Resources and Capabilities

Our results indicate that the resources and the strategic capabilities of union delegates (the vertical axis in Figure 1) are associated with their feeling of exerting influence in their workplace and union. Drawing on the component indicators of a feeling of workplace delegate influence, union delegates who report stronger resources and strategic capabilities are more likely to enjoy their work as a union representative, to feel that this work allows them to develop their capabilities, to have an influence on what goes on at work, to feel really involved in their union's activities, and to try to implement the policies and orientations of their union.

Two types of power resources are associated with greater influence: internal and external resources. We measured *internal power resources* in two different ways. The first measure gauged the intensity of information exchange with members as measured by the frequency with which teachers in their school use individual or small-group meetings with the workplace delegates and with their union representative to obtain information on the actions and orientations of the different levels of their union. More extensive use of such meetings is significantly associated with a greater influence on the part of the workplace union delegate. The second measure of internal solidarity is based on the delegate's assessment of the overall usefulness of a range of different groups or interlocutors in her or his role. These include the previous union delegate, the school administration, parent representatives, colleagues, the union staffer, some other person in the union, or some other person from their entourage outside the school. These internal networks—a kind of social capital—appear to be a type of

power resource (internal solidarity) on which the delegate can draw in order to do her or his job more effectively, in terms of the influence they exert in their workplace and union.

External resources were also measured in two different ways. First, delegates who report more frequent contacts and information exchange with persons outside of their establishment are also likely to exert more influence in their workplace and their union. These external networks might include delegates and representatives of other categories of staff in their establishment, delegates from other schools in their regional union, delegates from other schools in other regional unions, and representatives of social groups or community organizations. Second, schools where the delegates report more frequent participation in the external forums and governance structures of their union are also likely to exert greater influence. In the case of the FSE, these include delegate meetings of their regional union, the annual meeting of their regional union or sector, and the congress of their parent union federation or central labor body.

Our analysis also revealed the importance of two types of strategic capabilities. In terms of *learning capabilities*, the analysis highlighted the importance of delegate experience, training, and knowledge. Delegates with more experience in their current school and in their previous schools are more likely to exert a stronger influence. Similarly, delegates who have received training for their role as delegates and other forms of union training are also more likely to be influential. This finding is consistent with other studies that point to the importance of union education for delegate effectiveness and, in particular, the importance of broader forms of training (see Peetz and Pocock 2009). Furthermore, delegates who are more knowledgeable about the content of both local and national collective agreements and who are more familiar with the policies and orientations of their local and sector/national unions are also likely to feel that they exert a stronger influence.

Our analysis also highlighted the importance of *bridging or articulating capabilities*. We measured two types of bridging role. A relay role concerns the classic intermediary or bidirectional functions of a workplace delegate within the union: on the one hand, providing information on the union to new members, encouraging members to participate in union demonstrations, participating in union campaigns about the importance of public education and services, and mobilizing members against the creation of a nonunion professional regime for regulating teach activities; on the other hand, presenting the point of view of members to the local union and participating in union committees and networks. A second representation role concerns the extent to which delegates are dealing with local management to resolve problems, to raise health and safety issues, and to ensure the respect of the collective agreement. While previous studies have identified the importance of movement between relay and representational roles (Chang 2005), our analysis indicates that both of these roles are associated with the influence felt by delegates in their workplace. Most importantly, delegates who score strongly for both roles are more likely to exert an influence in both their workplace and their union. This suggests that it is the ability to bridge these roles and articulate between these different levels and types of action that is potentially a key element in the strategic toolkit of workplace union delegates.

Overall, our results indicate that internal and external power resources and learning and bridging capabilities are associated with the influence that workplace union delegates feel they exert in their workplace and their union. However, they are not associated with the degree of control that delegates feel they exercise over their work as union representatives.

Explaining Patterns of Control and Influence in the Union Delegate Experience

The combination of these two types of factor, that is, the importance of context for the feeling of control and the importance of resources and capabilities for the feeling of influence, offer important insights into the different types of disempowerment and empowerment and the potential movement between them. It's important to keep in mind that the initial mapping of the types of delegate experience and the subsequent analysis of the factors associated with their location in the matrix are distinct steps in the analysis. We first identified the four types of delegate experience. Only then did we explore the factors associated with one type of experience rather than another. In contrast to more conventional studies of empowerment and disempowerment, our results point to different types of empowerment and disempowerment along two dimensions: relative influence and control. Moreover, different types of factor are associated with each of these dimensions: contingency or contextual variables are impacting on control, whereas relative influence appears to be an expression of power resources and capabilities.

A *powerless* delegate feels that she or he neither exerts an influence nor is in control. Such a delegate is likely to face an adverse context and lack both power resources and strategic capabilities. It's the worst of all worlds and suggests that local union action is likely to have little impact (as measured by the influence of delegates) and high rate of burnout (as measured by their comparative feeling of a lack of control over their union work). A *powerful* delegate provides a mirror image. She or he exerts influence and feels in control, and this experience is associated with a more favorable context and greater power resources and strategic capabilities. However, our analysis also points to other types of disempowerment and empowerment. The *disengaged* delegate, who does not exert influence but feels in control, is weak in power resources and strategic capabilities but fulfills his or her role in less adverse circumstances than the powerless delegate. The *influential delegate who is in precarious control* reflects a different kind of empowerment since this delegate is much stronger in terms of power resources and strategic capabilities but also faces more adverse circumstances.

Conclusion

Our findings are naturally limited by the nature of the study. First, while providing a detailed portrait of workplace union delegates at a particular point in time, the study can neither accompany those delegates in their decision making and strategizing nor take account of the changing circumstances they face. Second, while providing a

detailed portrait of their behavior, the delegates are of course expressing their own perceptions. However, because we are capturing the assessment of such a large range of delegates, including those whose interaction with external union structures is often very limited, our study offers insights that open up a number of implications for union strategies.

First, changes in management strategies stemming from the NPM pose daunting challenges for unions. Increased decentralization and the multiplication of local actors create new stresses and strains for workplace delegates. Our study suggests that not all workplace union structures are equipped to deal with these changes, as evidenced by the different types of disempowerment among workplace union delegates. A significant proportion of delegates do not feel that they are influential in their workplace and union, and a significant proportion also experience issues of control over their role as a delegate.

Second, the identification of these two dimensions yields different types of empowerment and disempowerment, ranging from powerless (neither influential or in control) to disengaged (not influential but in control) to precarious control (influential but not in control) to powerful (influential and in control). Our typology of these types of delegate experience emerges from the assessment by the delegates of their own workplace experience. Union educators, officers, and staff need to be attentive to the dynamics of each of these forms of delegate empowerment and disempowerment and in particular to both influence and control. Disempowerment, be it in terms of lack of influence or control, is an important challenge for unions seeking more robust workplace structures. This is especially likely to be the case if delegates feel that their influence comes at too high a personal cost in terms of control over their union work.

Third, our study also differentiates between the factors associated with these different types of experience. A key finding is that the dynamics of control and the dynamics of influence appear to respond to different drivers. An adverse context exacerbates the loss of a feeling of control, whereas the mobilization of a range of power resources and delegate capabilities can lead to a feeling of greater delegate influence in both workplace and union. It then becomes important to identify levers for union intervention in the possible movement from one type of delegate experience to another (see Figure 1). The enhancement of power resources and strategic capabilities, which is an avenue available through union education and mentoring, offers pathways from disempowerment to empowerment. In an already adverse context, a reinforcement of power resources and strategic capabilities can conceivably help to transform the experience of powerlessness to one of precarious control. A similar strategy provides a pathway from the experience of disengagement to powerfulness in more favorable circumstances. Where the organizational context is deteriorating, and this is certainly a significant trend for many workplace activists, the same focus on power resources and capabilities offers a way to move from disengagement to greater influence, albeit in a context likely to translate into precarious control.

Fourth, our findings reinforce the contention that the greater workplace pressures associated with NPM (austerity, multiplication of precarious jobs, conflicts between different professional identities) make the conditions for workplace activism all that

more difficult (Bach and Givan 2008). The findings on the difference between influence and control suggest that these pressures are working on the feeling of delegate control and that this is, in turn, linked to workplace context and contingency. Two issues emerge from this result. A first concerns which factors or capabilities might work as a counterbalance to these workplace pressures and their effects on delegates' feeling of control. Both researchers and union experimentation could usefully focus on how to improve the feeling of control experienced by workplace union delegates. Perhaps there are other capabilities or resources that might make a difference. For example, various studies point to the importance of storytelling or narrative resources and framing capabilities in enlarging their repertoires of action (for example, see Ganz 2004; Lévesque and Murray 2013). In other words, delegate capabilities are essential to changing larger patterns of behavior within the union. A similar argument can be made about fostering collaborative behavior in contexts characterized by greater individualism and conflicting identities through intermediary capabilities (Lévesque and Murray 2010). A second issue is whether resources and capabilities actually play a role in modifying contexts. We might argue that contexts are not simply "a given" and union delegates and the networks of solidarity they can create can actually have an impact on both the behavior of managers and on the way that workplace pressures experienced. As eloquently expressed by one of the participants in our study, the key challenge is "how to force the employer to be a more acceptable employer."

Finally, this analysis of varieties of empowerment and disempowerment and of their drivers raises questions about larger union strategic orientations. Whatever the strategic orientation adopted by the central union, workplace union delegates appear to be essential to union strategies. At a minimum, where the union continues to focus on more centralized bargaining arrangements with the employer, ongoing changes in public-sector management are having considerable impact at the level of the workplace. This calls for greater delegate empowerment, which supposes a certain shift in union servicing and organizing strategies. Beyond this minimal shift, where unions are pursuing a strategy of resisting austerity and seeking to build public support for union resistance to cutbacks, the onus is on the capacity of delegates to take on a larger role within their unions (see, for example, Fairbrother et al. 2012). For union delegates to exert greater influence requires both resources and capabilities. Resources include greater internal and external solidarity. Internally, these take the form of social networks and deliberative vitality; externally, it is a question of connecting with external union forums and services, hence the importance of investing in the democratic life of the union. In terms of capabilities, union servicing needs to target both learning and bridging or articulating capabilities. It is particularly important to encourage delegates to adopt bridging roles, where they combine both relay roles within the union and representative roles towards local management. Union education appears to be especially effective in this respect. Future studies can therefore usefully explore the impact of a wider range of resources and capabilities on the relative influence of delegates and whether and how such influence can contribute to changing the context. This also suggests the need for union educators to focus on how particular delegate capabilities are essential to the mobilization of union resources, which in turn offer an avenue for changing the delegate and the union experience.

Appendix I

Means and Standard Deviations of Independent Variables

Variable	Mean	Standard Deviation
Workplace context		
Educational institution (<i>secondary</i> = 0, <i>elementary</i> = 1)	0.71	0.45
Workplace constraints (<i>weak</i> = 1, <i>strong</i> = 5)	3.61	0.73
Arbitrary behavior of school administration (1-5)	2.39	0.81
Open attitude of school administration (1-5)	3.09	1.06
Power resources		
Intensity of information exchange with members (2-6)	3.65	0.84
Internal network of workplace delegates (0-14)	4.91	1.36
External network of workplace delegates (4-16)	8.19	2.26
Participation of workplace delegates in union bodies (3-12)	7.76	2.12
Strategic capabilities		
Learning: Experience (1-4)	2.52	1.17
Learning: Union training (1-3)	2.16	0.82
Learning: Knowledge (1-4)	2.57	0.54
Articulating: Relay role (0-1)	0.63	0.48
Articulating: Representation role (0-1)	0.59	0.49

Appendix 2

Discriminant Analysis: Factors Associated with the Type of Workplace Delegates Experience (Degree of Influence and Control)

Independent Variable	Combined Intragroup Correlation		F Value
	Function 1	Function 2	
Workplace context			
Elementary school	-.16	-.41	9.0**
Workplace constraints	.23	.60	19.1**
Arbitrary administration	.10	.63	15.1**
Administration's openness	.08	-.24	2.9*
Power resources			
Internal: Intensity of information exchange with members	.24	.02	7.2**
Internal: Delegate network	.26	-.17	9.9**
External: Delegate network	.43	-.18	23.8**
External: Participation in union bodies	.62	-.23	50.4**

(continued)

Appendix 2 (continued)

Independent Variable	Combined Intragroup Correlation		F Value
	Function 1	Function 2	
Strategic capabilities			
Learning: Delegate experience	.48	-.02	29.0**
Learning: Union training	.56	.11	39.9**
Learning: Delegate knowledge	.67	-.21	57.5**
Articulating: Relay role	.43	-.18	24.1**
Articulating: Representation role	.55	.20	38.5**
Functions at the barycenters of groups (types of experience of workplace delegates)			
Powerless	-.59	.39	
Disengaged	-.70	-.19	
Influential but precarious control	.88	.43	
Powerful	.55	-.41	
Canonical correlation	.56**	.34**	
N	800		

* $p < .05$. ** $p < .001$.

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Notes

1. Unions in different countries label their frontline union reps in different ways—shop stewards, workplace reps, union delegates, and so forth. We use the expression “workplace union delegate” in this article, often shortened to “workplace delegate.” It should be

understood as a synonym for the person who exercises this frontline, largely voluntary and generally unpaid, union role.

2. All quotations from union members are translated from the original in French.
3. The extent of agreement or disagreement for all indices is a five-point scale: *completely disagree, somewhat disagree, neither agree nor disagree, somewhat agree, and completely agree*.
4. These two indices emerged from factor analysis of the data, and delegates subsequently confirmed that these constructions “spoke” to their experience, not least their efforts to renew frontline union representation. We might think of them as two dimensions of relative empowerment and disempowerment. However, they are not to be conflated as the statistical analysis clearly identifies two different dimensions of delegate empowerment emerging from our large sample of union delegates. Space constraints prevent us from presenting a more detailed analysis, but these results are available on request.
5. Space constraints prevent us from presenting a more detailed analysis but readers can also consult Le Capitaine, Murray, and Lévesque (2013) for a consideration of the relationship between gender and empowerment. The results for the split sample are available on request. Unfortunately, the representation of visible or racialized minorities in our sample of delegates was too small to conduct a separate analysis.
6. This figure draws on the statistical result of the discriminant analysis presented in Appendix 2. The discriminant analysis produces two functions that are statistically significant ($p < .001$) with overall canonical coefficient correlations of .56 for the first function and .34 for the second function. The mean scores on these functions enable us to locate each type of delegate experience on two axes corresponding to the variables included in each function, which correspond to the workplace context (horizontal axis) and the resources and capabilities of the delegates (vertical axis).

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