

Trade Union Administration

A Caribbean Workers' Education Guide

Robert L. Morris

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Preface

The management of trade unions in the challenging environment in which they have to operate today requires skills which were previously frowned upon by trade unionists. These skills are basically the same as are required to run any modern day organization effectively. Financial management, accountability to members, research and development, organizational and negotiating skills, and planning for the future of the organization are some of the approaches which successful trade unions use.

Globalization, the demands which are made on trade unions by their members and the new industrial relations environment which is emerging, have all had the effect of forcing most of the trade unions in the Caribbean to modernize their administrative structures and their approaches to labour/management relations so as to cope or keep pace with the changes which are taking place.

Mr Robert Morris, Deputy General Secretary of the Barbados Workers' Union and its Director of Organization actively participated in the delivery of seminars in the ILO/DANIDA (International Labour Organization/ Danish International Development Agency) Project for strengthening trade unions in selected countries in the Caribbean. This Manual is an output from the Project and has been developed by Mr. Morris.

Funding for the printing of this Manual was co-shared by the Workers' Activities Bureau (ACTRAV) of the ILO and by PROMALCO (Programme for the Promotion of Labour/Management Cooperation) at the enterprise level – a US Department of Labour Project - which is being managed by the ILO Caribbean Office.

This Manual captures the essentials for effective trade union administration in a modern environment and through exercises at the end of the chapters, seeks to reinforce on the trade union practitioner the importance of the approaches which have been highlighted.

This publication is one in a series of Workers' Educational Manuals that have been developed under the guidance of Mr. Evelyn Greaves, Senior Specialist, Workers' Activities and produced by the ILO Caribbean Office.

Mr. Willi Momm, the Director, ILO Caribbean Office (1997–2002) gave every encouragement possible for the development of the series.

Luis Reguera
Director a.i.
ILO Caribbean Office



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Introduction

There are several texts which have been written on the trade union as an institution. Most of these have been prepared by academics for use in undergraduate and post graduate studies. Rank and file trade unionists in the Caribbean need a basic primer on the institutions to stimulate their thoughts on the trade union as an institution, its aims, functions, process, structure and its outputs.

At a time of global change trade unions, like all other institutions have to examine themselves and begin a process of responding to the changing environment in which they find themselves. Hopefully, this manual will contribute to the process.

I extend special thanks to Mr Willi Momm, Director of the ILO Caribbean Office, Mr Evelyn Greaves, Senior Specialist, Workers' Activities, ILO Caribbean Office, for their assistance in developing the module. Mr LeRoy Trotman, General Secretary of the Barbados Workers' Union gave full encouragement. Ms Coreen Gibson has been a tower of strength in typing the manuscript.

This manual was tested at a Meeting/Workshop for the final Evaluation of the ILO/DANIDA Project for Strengthening Trade Unions in Selected Caribbean Countries in Guyana in December 2001. Special thanks for the insights offered by all workshop participants but particularly to Brother Steen Christensen, General Secretary of the Danish Trade Union Council for International Development Cooperation and to Brother Neils Enevoldsen, from the Workers' Education Branch.

Module 1

Trade Union Development and Challenges



Objectives

- (1) *To examine the current situation facing trade unions in the Caribbean*
- (2) *To examine the challenges to trade union development*

1.1 Trade Union membership and density

In 1998, the International Labour Organization's Caribbean Office produced a Digest of Caribbean Labour Statistics providing invaluable information on issues concerning labour in the Caribbean. The digest was published in 1999.

The following is an adaptation of the information provided on workers' organizations and members in the mentioned territories.

COUNTRY	NO. OF UNIONS	MEMBERSHIP
Anguilla	4	(Not given)
Antigua & Barbuda	5	17,273 (1993)
Bahamas	35	45,000 (1998)
Barbados	13	25,322 (1995)
Belize	9	3,207 (1995)
Bermuda	7	7,616 (1992)
Dominica	8	32,400 (1995)
Grenada	25	(Not given)
Guyana	15	66,295 (1992)
Jamaica	125 (Many not functioning)	(Not given)
Montserrat	5	742 (1996)
Bonaire	1	(Not given)
Curacao	3	(Not given)
St Maarten	5	4,900 (1996)
St Kitts-Nevis	8	3,000 (1996)
Saint Lucia	5	7,400 (1995)
St Vincent & The Grenadines	6	5,809 (1996)
Suriname	6 (Confederation)	50,000 (1995)
Trinidad & Tobago	27	(Not given)

Additional information is provided about the national centres in the various countries.

The Bahamas has two national centres:

1. The Commonwealth of the Bahamas Trade Union Congress; and
2. The National Congress of Trade Unions.

The other national centres which presently exist are:

Country	National Centre
Barbados	Congress of Trade Unions and Staff Associations
Belize	National Trade Union Congress of Belize
Grenada	Grenada Trade Union Council
Guyana	Guyana Trades Union Congress
Jamaica	Jamaica Confederation of Trade Unions
St Vincent & The Grenadines	National Labour Congress
Trinidad	National Trade Union Centre
Suriname	Ravaksur

In May 1998 the Caribbean Group for Cooperation in Economic Development (CGCED) published a document prepared for the International American Development Bank on Workers and Labour Markets in the Caribbean. According to their report, union density in 1996 in Caribbean members of the CGCED was as follows:

Country	%Labour Force Unionized
Antigua & Barbuda	20 – 28
Bahamas	25
Barbados	20
Belize	11
Dominica	10
Grenada	20 – 25
Guyana	34
Jamaica	15 – 25
St Kitts-Nevis	33
St Lucia	20
St Vincent & The Grenadines	10
Suriname	60
Trinidad & Tobago	20 – 28

Further information from these sources indicate that the main areas in which collective agreements exist in these countries are: manufacturing; wholesale and retail; transport; storage and commerce; public services;

utilities and hotels. In some countries, especially the larger countries, quarrying and mining are areas covered. In few of the countries, Trinidad as an example, finance and insurance is a major area in which collective agreements exist.

Information on trade unions in the Caribbean has not been collected on a systematic basis and it is therefore difficult to provide time series and comparisons over time to indicate in a scientific and systematic way how the trade union has fared over time.

The information available, however, suggests that the trade union as an institution is well-entrenched in the labour markets of the Caribbean. The density of union organization must not be confused with the wider coverage which workers, who are not members of the trade union receive because they automatically benefit from gains made by those within the bargaining unit.

Agency shop arrangements have existed in some countries such as in the public service in Guyana and in Antigua. However, the system has often been plagued by problems.

Trade unions are now accepted as valuable institutions helping to regulate the labour markets in our country. The concept of social partnership is helping to further this acceptance, and is elevating the trade union from its well-entrenched role at the micro level, within firms, to the macro level where it can contribute to national planning and national development.

1.2 Impact of globalization

Challenges facing the trade union movement

Some questions are being raised about the ability of trade unions to survive in the current economic environment. Suggestions have been made that globalization is inimical to the existence of the trade union as an institution, and that the effects of globalization will lead to a weakening of the movement.

While there is a shortage of empirical evidence on the impact of globalization on trade union density, and on its ability to maintain collective agreements, there is some evidence that the 1980s and 1990s witnessed a weakening of the membership base in the world. It is difficult to determine the extent to which the decrease in trade union numbers can be attributed to the periodic recessions in the world economy, as against the anti-union strategies developed by leading national governments.

In the Caribbean, the interventions of the international financial institutions in the 1980s and 1990s led to the introduction of stabilization and structural adjustment programmes which triggered deflationary policies resulting in massive job losses and consequently lowered union membership. Operating against the background of depressed economies, trade union

pushfulness was constrained. Various types of methodologies, including wages restraint and wages guidelines, became the norm in the region and there was a significant slowing of industrial action in countries which hitherto were known for the militancy of their trade union efforts.

It can be argued that the period of the 1980s and 1990s saw an erosion of the consolidation of the trade union and its membership, as well as the financial strength which characterized the decades of the 1950s and 1960s and which saw some slowing in the 1970s.

Development of the services sector

Another factor which has impacted on the trade union is the development of the services sector, and in particular, the massive increase in knowledge workers.

Increasingly the areas that beckon for trade union organization are those in the services sector, where white collar and highly educated workers are employed. Trade unions have developed great expertise and experience in organizing and relating to white collar workers in the public sector. However, there has been a slower response in organizing workers into trade unions in areas such as finance and banking. This does not mean that there are not active bank employees' unions, and indeed several do exist, but there are still some countries where significant headway remains to be made in organizing workers in this area.

This is also true of employees in supervisory, technical, professional and managerial areas. There have been tendencies to develop staff associations to represent workers at this level, since they seem to lack confidence in the capacity of the established trade unions to represent them.

Atypical employment

With the spread of technology, trade unions are being challenged to develop strategies to embrace workers who are in atypical forms of work arrangements. In many instances, workers who were former members of trade unions find themselves having to eke out a living as workers in the informal sector. Most trade unions are actively engaged in developing strategies to deal with the relatively new entrants to the labour market.

Another challenge is that the use of computers is facilitating home workers who are not necessarily grouped as employees in the common workplace. While this feature is not yet widespread, it is likely to be a challenge to the trade union in its quest of organizing.

A similar challenge exists where free trade zones have been established in Caribbean countries. Such free trade areas have been able to resist the trade union movement and hinder its capacity to recruit thousands of workers who would normally fall within the trade union's umbrella.

Human resource development strategies vs. trade unionism

There is a growing perception that the private sector is using human resource management strategies to hinder the development of the trade union. One of the fastest growing areas of education for professionals is that of local and international access to training in Business Administration at the certificate, diploma and bachelor's and master's level. A large number of graduates are forming human resource management associations in different countries, and there is a regional grouping of human resource management practitioners. Human resource management tends to adopt strategies which tend to challenge the trade union and which tend to de-emphasize industrial relations. Trade unions are being forced to evaluate their practices in relation to this development.

Individualism vs. collectivism

There is a growing tendency among young entrants to the labour market to question the current role and practices of the labour movement. Some of the young adopt the view that they can gain significant personal achievements without the intervention of the trade union. Employers have been quick to use this development to introduce a level of individualism into industrial relations, particularly through emphasizing the personal contract as against the collective agreement, stressing personal compensation, and using other strategies to destabilize the collectivism which is the basis of trade unionism.

Caribbean countries generally have open door policies in relation to foreign direct investment. The result is that transnationals find a ready acceptance, and in many instances, the host country supporters of the investment appear willing to provide exemptions and derogations from local standards for these investors. Hotels, which promote all-inclusives and resist trade unions, and manufacturers in search of cheap but competent and reliable labour, are likely to receive local champions who consider the trade union as a restraint on local economic development.

While political unionism is not practised to the extent of earlier decades, there is still some concern about the role which trade unions play in local partisan politics. In some instances, trade union bargaining and other activities are seriously affected by perceptions of the political role of the trade union.

Much focus is being placed on the trade union as a business organization. It was not unusual in the pre-1980s for Caribbean trade unions to depend on various forms of assistance, including direct contributions to payroll costs, to conduct their business. Little public information exists about the economic viability of Caribbean trade unions, but it may be logical to assume that stagnating or declining membership can have a negative impact on the trade union's ability to service its members at a difficult period of Caribbean development.

The challenges facing the trade union as an institution demand a new focus on the trade union's role, and how it manages its business. Like all institutions, trade unions need to reflect, evaluate and adjust to a continuing process of keeping relevant. The growth of non-governmental organizations, and their acceptance at the international, regional and national level as co-spokespersons for the constituency of the trade union should be a wake up call for trade unionists.

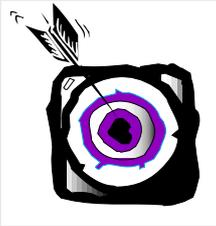


Exercise

1. How successful have Caribbean trade unions been in developing meaningful and reliable information databases?
2. What are the challenges facing the trade union in recruiting young workers into the movement?
3. Are there codes or standards in your country detailing the relationship between foreign investors and trade unions?

Module 2

The Function and Role of Trade Unions



Objectives

1. *To define the nature of a trade union.*
2. *To create an understanding of the functions of a trade union in the Caribbean.*

2.1 Definition of a Trade Union

A trade union is an organization based on membership of employees in various trades, occupations and professions, whose major focus is the representation of its members at the workplace and in the wider society. It particularly seeks to advance its interest through the process of rule-making and collective bargaining.

2.2 The Function of Trade Unions

In each country, trade union legislation (usually a Trade Union Act) gives a legal definition of a trade union, and sets out its objectives. The Labour Relations Code 1976, established under the Labour Relations and Industrial Disputes Act 1975 of Jamaica sets out what is considered to be the main objectives of the trade union:

“The main objective of a trade union is to promote the interest of its members, due regard being paid to the interest of the total labour force and to the greater national interest. To achieve this aim, trade unions have a duty to maintain the viability of the undertaking by ensuring cooperation with management in measures to promote efficiency and good industrial relations.

Trade unions should therefore:

1. where appropriate, maintain jointly with management and other trade unions effective arrangements at industry or local levels for **negotiation, consultation, and communication** and for **settling grievances and disputes**;
2. take all reasonable steps to ensure that their officials and members observe all arrangements;
3. provide for the **training of delegates** in the scope of their powers and duties and the day-to-day operation of the unions;
4. provide adequate **educational opportunities** for the advancement of their members;

5. be **properly staffed to serve the needs of their members**, and allow for effective lines of communication between such staff and the rank and file membership;
6. encourage members to take part in their activities by adopting such means as would best allow them to do so, including the **compilation and distribution of information**;
7. make available information pertaining to the **rules and policies of the union**;
8. provide **adequate advisory services** for their members and in particular assist them to understand the terms and conditions of their employment; and
9. **identify trends in industrial relations** to help their members to anticipate and keep abreast of change.”

This piece of national legislation provides a relatively restrictive function for trade unions, in keeping with the purposes of the legislation. Trade unions themselves set out their functions within their rulebooks. Most of them add others, in addition to the functions mentioned above, including interventions in the economy through sponsorship of trade union business activities and cooperatives, and political roles, among others.

2.3 The Role of Trade Unions

Generally, it is possible to summarize the various functions which Caribbean trade unions have undertaken:

1. **Political role**, using collective power to influence decisions on behalf of members and the wider society;
2. **Market role**, by intervention wage bargaining and thus impacting on the economy;
3. **Regulatory role** by setting standards in relation to jobs and terms and conditions;
4. **Democratizing role**, in creating industrial democracy at the workplace;
5. **Service role**, in promoting the intervention of members;
6. **Enhancement role** in helping to develop the human potential of members; and
7. **Welfare role** in providing assistance to particular groups.

1. Political role

In many instances, trade unions were established in the Caribbean before the advent of political parties which evolved from the trade unions. This resulted in a close nexus between the two institutions which were often organically linked. In the early stages of their development, some trade unions functioned as rate payers institutions, increasing the wages of members who were then able to become electors by reaching the required franchise qualifications.

The vote of trade union members was important in assisting labour leaders to become members of the political elite. In every country in the region, at some time or another, trade union leaders became politicians.

Trade unions were able, through their leadership, to lobby for significant social and labour legislation to be placed on the statute books. In addition, they were able to ensure that consolidated funds provided for the improvement of the infrastructure, so that roads, housing and sanitation facilities were available in areas that were depressed.

In recent times, some territories have moved away from leadership which arose out of the nexus between trade unions and political parties. Many political leaders have reached their position through their professions as lawyers, economists, agricultural scientists and similar occupations and do not necessarily relate to trade unions through a bond of association. There are still leaders who owe their elevation to an association with the trade union.

Many trade unions are able to use their influence, and sometimes power, to impact on political decisions.

There are many who recognize that power relations are at the basis of industrial relations, and that trade unions are political institutions. Some recognize the trade unions as exercising a countervailing power against the state, and the private sector, on behalf of their membership which comprises mainly the working classes.

In exercising their political power, trade unions have to be wary of the dynamics of party political structures in the communities. In some territories, trade unions are still linked, almost organically, with political parties. In others, there are less-structured relationships. In others, trade unions remain uncommitted to the party political process, and while influencing the process, remain uncommitted and unrelated to any particular party, basing power on the support of the membership.

The reality is that as political parties have matured, developing their own machinery, particularly for election purposes, and providing status and opportunity for their members, they have had to rely less on trade unions.

Trade unions, because of their basis and deep commitment to their membership, which is largely drawn from the cohorts of the working class, may find themselves in conflict with parties which are often multi-class coalition dominated by interests which are not always favourable to the masses.

Stabilization and structural adjustment policies pursued by some political parties supposedly linked to the labour movement, have led to alienation and disruption of relationships between parties and unions.

There is a growing tendency in the region for trade unions to disconnect from the organic relationship with political parties.

2. Market role

The market, or economic role of trade unions is no doubt the dominant role practised by Caribbean trade unions. Exclusive, collective bargaining trade unions negotiate wages and salaries, helping to distribute the value added in the business firm and increasing the spending power of their members in the economy.

In societies where the majority of people are wage or salary earners, the role of the trade union in regulating the local economy is extremely important. Labour costs are an important consideration in determining the ability of locally-produced goods and services to compete against any externally produced items.

In many Caribbean countries, there is constant tension between the state and the unions, and between the private sector and the unions, on the market role of trade unions.

Because of the relatively large role which the public sector still plays as an employer in the Caribbean, public sector wage/salary negotiations are often a barometer of the economic situation in most territories. There is a tendency for public sector negotiations to serve as a platform or indicator of levels of settlement in other areas of the economy. There is an underlying assumption that government should be a more liberal and generous employer than others in the community. There was also a perception that government could never argue that it was unable to pay as it could have recourse to taxation to pay for salary increases.

While maximizing benefits to their members, trade unions are always conscious of the possible impact of their bargaining on inflation and employment. Caribbean countries are generally open economies, dependent on trade for survival. In many instances, inflation is determined by the cost of goods and services which are imported. There is not much evidence to suggest that trade unions are responsible for cost-push inflationary tendencies in the region.

In some countries, trade unions are accused of contributing to regimes of high wages and high labour costs, leading to unemployment as investments are not encouraged, and existing businesses falter as a result of high costs.

Caribbean countries generally do not provide information on the distribution of income so as to assess the movement of labour's share in the income. There is some indication that there is increasing inequality in wage and salary distribution. In some countries, areas that are not unionized, such as the offshore banking and financial sectors, are attracting salaries in excess of the national average which is likely to be impacted by collective bargaining.

The point has to be made that the trade union's economic or market function in the Caribbean is generally reactive. Trade unions direct their efforts at protecting their workers against the ravages of inflation, and trying to improve living standards which have been depressed for historical reasons. They also try to defend their member's right to work and are supportive of both macro and micro economic policies which would be conducive to high employment.

3. Regulatory role

The early craft union has as one of its basic functions the regulation of apprenticeship and setting of standards of work required of journeymen and master craftsmen, and linking this to pay. Trade unions are still influential in determining and establishing job standards in the workplace.

Increasingly, management has sought to regain control of the workplace and to determine unilaterally, matters relating to the nature of jobs and other working conditions. Even at the international level, employers are claiming that workplace standards, in keeping with ILO Conventions and Recommendations, are proving onerous and difficult to maintain. There is an increasing trend towards attempts at rolling back many of the gains achieved by trade unions.

The strength of the trade union at the workplace level determines its ability to perform its job regulation function. Strong trade unions have entered into arrangements where the power of management has to be shared with the union at the workplace. Jointly agreed procedures for dealing with major issues in the workplace e.g. grievances, discipline, job evaluation, redundancy, work changes, safety and health, along with the right to negotiate terms and conditions through collective bargaining, provide the sound basis for unions to perform regulatory functions.

Trade unions are currently trying to expand such joint arrangements to cover areas such as training, equal rights for part-time employees, sexual harassment, treatment of those with chronic diseases, and other areas. On the other hand, some employers are seeking to side step the trade union by engaging in direct contract with employees rather than encouraging union participation.

4. Democratizing role

The trade union's rank and file are provided with the opportunity of electing their stewards, committees of management, and through the delegate system, their executives and other leaders. The process of preparation for collective bargaining also encourages worker participation. Trade unions are fertile institutions for the furtherance of participatory democracy, for the freedom of assembly, the right to speak freely and the right to exercise choice.

Traditionally the separation between capital and labour has created a situation where it has been accepted that management is imbued with the right to manage, which is interpreted to mean that workers are mere resources to be manipulated like any other resource.

Paternalistic, autocratic and top-down management has been characteristic of the social relations in the workplace. Indeed, there is a notion that the plantation has created the model of relations for other workplaces in the Caribbean.

Decisions were made at the top and, through the route of edicts and directives, were passed through various levels to the rank and file. Like opportunity was afforded to challenge these directives. Those who tried to do so were branded by the system. Conformity and compliance were highly valued. The hierarchical system within the workplace conformed to the system within the wider society, with those at the level of the boardroom and management deriving from a different class origin, and sometimes, a different ethnic origin from those on the shop floor. Power in the society was reflective of power in the workplace.

Access to popular political participation, through the right to vote, has led to demands by workers for economic democracy, defined as the right to participate in industrial democracy.

Trade unionists have demanded the right to have workers sit on the Boards of Directors as the epitome of workplace democracy.

5. Service role

Trade unions attempt to develop services which are valuable to their members as individuals, outside of the scope of collective bargaining. In the early stages, this took the form of mutual assistance, but with the onset of the welfare state, with provisions for national insurance and similar schemes, this demand has abated.

Yet trade unions have recognized the need to expand their role in assisting their members in a variety of areas, and so have undertaken a number of non-traditional ventures on behalf of their members. Some of the most successful cooperative organizations, particularly credit unions in the Caribbean, have been developed by trade unions on behalf of their members. Trade unions have also developed housing land-lease schemes, transport and service stations, banks, laundermats, cinemas, stores, insurance programmes and other schemes for the benefit of members.

One of the major matters agitating the concern of some trade unions is the issue of pension funds, contributed by members. In many instances, trade unions negotiate pensions for workers. Contributions are collected and managed by professional firms which become extremely wealthy. Trade unions are becoming aware that they should develop the expertise to manage such funds on behalf of their members.

In recent times also, the closure of companies or parts of companies has led to opportunities for worker ownership and control of business. Trade unions have been able to offer professional, advisory and management services to assist in establishing businesses for the workers, and in some cases, trade unions have actually become shareholders in the business.

The non-traditional membership services can be attractive and appealing and can act as focal points for recruiting members who are attracted by the image of the unions as a diverse and effective organization.

Trade unions also supply legal and medical services for their members. Some trade unions recognize the high cost of legal representation in the Caribbean and seek to provide legal assistance to their members. This is especially important in areas where the collective bargaining and grievance handling process is highly regulated.

There are a number of instances where trade unions have established partnerships with medical practitioners to provide services for their members in a proactive system. Regular medical check-ups and inspections help to deter the need for corrective medicine, and leads to a healthier and more effective membership.

6. Enhancement role

Trade unions provide the opportunity for workers to develop pride in themselves, to reach positions of leadership and to excel, where without this vehicle of mobility, many would have had a stultified existence. Many persons who have moved on to management and other leadership roles can testify to their beginnings as shop stewards who were given basic training and opportunity for leadership in the labour movement.

Trade unions can develop as multi-issue, multi-functional organizations catering to the wide interest of their members. Thus, for those diverse interests, trade unions can provide organizational support to enhance their effectiveness. Groups such as the youth, women, and the elderly can be given the opportunity to develop themselves through programmes which cater to their needs.

The role of trade union education is critical to helping members to develop their potential.

7. Welfare role

Some trade unions have actively engaged in providing welfare services for members and even for the wider community. This takes various forms including the employment of those who have disabilities, as an example to the wider community, the provision of family services including baby creches, child care centres and old people's homes, as well as play and recreational centres in depressed areas.

The reality is that trade union functions have developed out of historical circumstances. In some situations, trade unions function within the narrow business union function, limiting their interventions to their market and job regulation aspects. In other areas, trade unions are multi-issue and multi-functional institutions, conforming more to the idea of the trade union as being part of a movement.

In some instances, trade unions transcend the representation of their membership and reach out on behalf of non-members, including the unemployed, the disabled and others who need their assistance in the wider community.



Exercise

1. ***Give reasons why trade unions should not limit their role to business unionism?***
2. ***Give arguments for and against the alliance of trade unions to political parties.***

Module 3

The Organization and Structure of Trade Unions



Objectives

- (1) *To examine how trade unions organize themselves in the fulfilment of their roles.*
- (2) *To focus on the different types of trade unions.*

3.1 Organization vs. Structure

Organization relates to the coordination of people, processes, systems and activities to render administrative, technical and representational services to members.

Structure refer to the different types and classification of unions.

The trade union in the Caribbean exhibits an array of examples of 'organization' and 'structure'. There is, of course, a symbolic relationship between organization, which speaks to how the union manages and governs itself, and structure, which relates to the type of membership.

The main factor that separates the trade union from other organizations such as the company, corporation or firm, is that it is a 'mutual' organization, owned by the members and run for their benefit.

This characteristic of the trade union should always be reflected in democratic control, accountability to the membership and decision-making that reflects the input of membership.

3.2 Trade Union Organization

Although there is a wide variety of trade union organizations in the Caribbean, there are certain basic patterns which exist. As most Caribbean countries are relatively small, geography does not play a significant role in trade union organization. This is not true in relation to larger territories such as Jamaica, Trinidad and Tobago, Guyana, Suriname and Belize where geographical diversity can impact on trade union organization, necessitating regional and other arrangements.

Most unions have a CENTRAL and an AFFILIATE or BRANCH system, and a DELEGATES' conference. In some countries a CONGRESS of trade unions provides another layer of trade union organization.

Central Control

The central control for many trade unions take the form of an Executive Committee, Council or Executive Board or some such similar designation. This Committee or Board is usually elected at a delegates' conference and carries out the policies determined by the conference. In some situations where the system relates to affiliates of unions to confederations, the central body is elected by the various affiliates.

The central control is generally responsible for employment of staff where the organization needs to have full-time staff. With the exception of a few, most trade unions in the Caribbean have paid full-time employees, especially the larger unions. In the case of professional and semi-professional groups, the tendency is to have competent members functioning as staff even though they may be paid by the employer, but are provided with generous leave terms and regulations.

In a small trade union, a primitive democracy can exist where at an annual conference, all members can attend, participate and contribute to decision-making. Larger unions resort to a delegates' system where delegates are elected by branches or divisions based on an agreed numerical ratio. This form of representative democracy gives the rank and file power to determine the policy of the union and control the activities of the central body as well as of the full-time officers.

In general or blanket unions, the division is a very important part of trade union organization, similar to the role of the branch in a confederation type union.

Governance and Administration

The governance and administration of the trade union generally falls to the responsibility of the central authority, and the full-time staff, as guided by the delegates' conference.

Traditional businesses refer to the use of "management process" involving planning, staffing, organizing, directing and controlling the organization in order to realize business objectives with effectiveness and efficiency.

Recognizing the mutual nature of trade unions, the term management may not be easily accepted in describing systems of trade union control. Yet it is important to recognize that there are sub-systems in trade union administration which makes it different from other organizations.

The union's ADMINISTRATIVE SYSTEM is similar in ways to that of other business systems requiring an executive authority that is finally responsible to a representative authority but which has the task of ensuring that the organization administers effectively and efficiently.

On the other hand, the REPRESENTATIVE SYSTEM ensures that the executives reflect the wishes of the rank-and-file membership.

3.3 The Administrative System

The Executive of the trade union represents the elected leaders (council, committee, board etc) and have the responsibility of planning, staffing, organizing, directing and controlling the business of the union.

Planning

Some unions utilize formal planning systems such as retreats to plan on an annual or less frequent basis for their members. In recent times a number of trade unions have used strategic planning to help them chart their paths. Such unions have developed mission and vision statements along with operational plans for their organization.

Among the planning functions which the executive are expected to perform are forecasting, setting objectives, developing strategies, creating programmes, preparing budgets, establishing procedures and developing policies to guide the organization through the planning period.

Some trade unions have developed procedures for the delegates' conference to play a vital role in the planning function. The delegates' conference, rather than being dominated by reports from the executive and staff, comprises planning groups which report to the council, providing a basis for action in the ensuing inter-conference period.

Staffing

Staffing requires the recruitment of qualified people for each position in the trade union; familiarization of the new people recruited with their roles; providing constant training to make them efficient by instruction and practice; evaluating them; and helping them to improve their knowledge, attitudes and skills. Trade unions need to be conscious of the remuneration and conditions of employment of members; provide for the expression of complaints and grievances; arrange for discipline; make provision for retirement and renewal; and consider succession planning.

Unlike other organizations, trade unions cannot afford to recruit directly from the market. Even though trade unions want to attract staff who are academically and technically qualified to perform their functions, issues of loyalty, commitment and dedication to trade union ideals must be important in determining suitability for employment in the organization. Trade unions are therefore likely to recruit persons to the staff who have demonstrated some connection to the labour movement.

It is not unusual for shop stewards to be recruited as full-time staff, or for academics with a track record of support for the movement, or for relatives

of trade union members to be taken on staff. Trade unions have to be careful in their recruitment processes not to display examples of nepotism or favouritism in staffing as this may draw the ire of the rank-and-file.

Staffing is extremely important in terms of servicing the needs of members and performing the multiple functions and roles established for the trade union.

Organization

The trade union should establish departments which help to facilitate the various roles established before. The major or core departments in a trade union would include those relating to recruiting members and organizing divisions or branches, financial management and administration; research; and education. Other departments may include safety and health, public relations, gender, youth, legal and member services, among others, depending on the complexity of the trade union.

Specialist full-time staff servicing these departments may include research officers, accountants, economists, educators, lawyers, safety and health specialists, journalists, public relations and marketing professionals, negotiators and recruitment or organizing specialists.

The positions held by various officers vary. In some instances, the Chief Officer in the Administrative Structure is referred to as the General Secretary. The principal assistants are designated Deputies, and there is then a variegated structure of assistants at various levels and other positions. In other situations the Chief Officer in the Administrative Structure is the President, who is much more than a presiding officer, and the assistants are titled vice-presidents.

Whatever the situation it is imperative that trade unions develop an organisational chart with clearly defined relationships to facilitate co-ordination of the job functions.

Trade union staff, like those of other organizations should have job descriptions which define the scope of their jobs, their responsibilities, relationship and authority. The executive should also define qualifications for each position. The organizational chart should show a definite line of progression ensuring mobility within the organization.

Directing

Trade union titles include those such as Director of Finance, Director of Industrial Relations, Director of Research and so on.

Direction is a fundamental administration function. It includes assigning responsibility and exacting accountability for results; persuading and

inspiring people to take a desired action; relating efforts in the most effective combination; managing differences by encouraging independent thought and helping to resolve conflict; and managing change through stimulating creativity and innovation in achieving goals.

It is fundamental that the trade union supervisory staff be empowered to direct their departments in such a way as to effectively utilize the human and other resources at their disposal for the benefit of the members.

Control

The entire system of administration of the trade union will be flawed if there are inadequate provisions for control. Trade unions must establish reporting systems for the collection of critical data. Membership figures, accounting information, agreements reached, submission dates for negotiations, agreed wages, salaries and conditions, correspondence received and sent out, and other critical information must be carefully kept.

In terms of trade union membership and finances, trade unions must be extremely vigilant in ensuring that membership dues are collected and properly accounted for both to the satisfaction of internal and external authorities.

A trade union's financial and dues structures are often causes for concern. Many trade unions find themselves in deficit positions because of inadequate dues structures. Some dues are based on a weekly figure which is raised occasionally by the delegates' conference. Some are based on a percentage of the employees' wages/salaries.

Proper budgeting ensures that the trade union has the resources to service its members efficiently. For some unions which have been able to develop surpluses, investment in services which are beneficial to members has proven to be rewarding. Thus while it is good to have cash reserves, it may be an indication that too much is being extracted as dues. In such a situation, the reserves should be invested in the members' interest.

The more likely alternative in the current scenario is for trade unions to experience deficits as a result of economic instability in the countries of the Caribbean. Trade unions have to be prudent and exhibit cost effectiveness in dealing with their members' funds.

All of the trade union's processes, including recruitment, accounting, research and education should be subject to the development of measurable and quantitative targets and standards and results should be measured periodically. Where adjustments to planning are necessary, counselling should be given to achieve the changed standards. The necessary motivation should be provided depending on the performance of departments and staff involved.

It is important that the trade union's full-time staff are always conscious that it is their responsibility to represent the interest of workers and there should be no conflict between these realities.

The representative system

While the administrative system provides effective governance, the representative system seeks to ensure that the policies and decisions of the union are acceptable to the general membership.

It is important to recognize that ultimate power in the trade union rests with the membership. A participative membership and an efficient administrative system leads to a highly effective trade union.

The trade union membership should be able to exert pressure on the executive and administration to ensure compliance with their needs.

3.4 The Branch or Division

The union branch or division plays a fundamental role in this respect as members, at that level, are able to communicate their individual views directly to the union executive.

Active branches or divisions are vital to trade union democracy and effectiveness. Concern has been expressed about the vitality of branches and divisions. There is a view that there is often inaction, with few members willing to take an active part and come to meetings, unless wages' negotiations or industrial action is being contemplated.

There are many members who are organized but not fully unionized. Organized members can be card-holders who participate to a minimum in trade union activities. The unionized are those who embrace the union fully and are active in union programmes.

The trade union stalwart is the epitome of the representative function. The stalwart is committed, dependable and ideologically in tune with the movement combining personal aspirations with trade unionism.

On the other hand, trade unions also attract those who, although members, can be highly critical of the union executive, and can become unpopular with the executive while counting on the popularity of the rank and file.

The key to active branch and divisional activity, the conversion of the organized into stalwarts and the moulding of the critical into active support depend largely on two important processes:

- (1) education and
- (2) communication.

Education/Training/Research/Communication

Education and training should be used by trade unions for a number of reasons, among which are:

- (1) the modification of attitudes and behaviours through learning experiences to build loyalty and commitment to the organization;
- (2) to provide particular cohorts such as staff, organizers and researchers with the relevant skills to function effectively and efficiently;
- (3) to create an aware, alert and active membership;
- (4) to provide members with a broad knowledge of labour-management issues;

- (5) to prepare shop stewards and officers of branches, divisions, boards, councils and committees to perform their functions; and
- (6) to provide training and re-training opportunities for members.

3.5 Broad Membership Education and Training

Building trade union solidarity and membership loyalty is fundamentally linked to the provision of trade union education and training. Whatever the size of the trade union, part of its resources should be allocated towards the provision of education and training for its rank and file membership. This provision should be implemented at the recruitment stage when members first join the union. At this stage, it is important to run orientation programmes for members, especially where groups are organized from workplaces that were not previously known to support trade union values.

Orientation programmes should be devised to educate members on the following:

- history and philosophy of the labour movement;
- the purpose and structure of trade unions;
- their rights, duties and responsibilities in the workplace;
- their union constitution and the duties and obligations of membership;
- basic safety and health;
- safety nets;
- some details about the labour legislation of the country;
- collective bargaining and the role of the shop steward; and
- grievance handling.

The main objective of this early education is to introduce members to the uniqueness of the trade union as an organization. The reality is that most workers know little about the trade union, as the formal education system does not provide coverage in the normal curriculum. Some students may be exposed to partial information from History and Social Studies, from Principles of Business or Economics, or from Politics. However, in each instance, little emphasis is placed on micro information about the trade union, and each academic discipline focuses on a different aspect of the trade union.

Trade unions are becoming sensitive of the fact that, in many instances, trade unions are portrayed in academic studies as dysfunctional organizations which create problems in the economy and society. In many instances, teachers and instructors do not portray the organization in a sympathetic light. The role of early membership training is to create a clear appreciation of the trade union as a workers' organization which, while recognizing the needs of employers and the state, has a primary commitment to the workers, with a concentration on the membership of the trade union.

This early membership training should be used to motivate members to commit to other more specialized and structured education and training which should be offered in a systematic and programmed way.

Trade union education for membership should be viewed as a special form of adult education and trade unions should ensure that such education is available to its broad membership. Modules should be developed on a wide array of areas such as human rights and trade union rights, the role of the International Labour Organization, the International trade secretariats and their functions, gender, citizenship and governance, basic economics, preparation for retirement, the environment, chronic and life threatening diseases, personal financial planning, and several others. Planning for membership education and training should flow from occasional training and education needs surveys among the membership.

Training and education should be graded at various levels, usually classified as basic, intermediate and advanced. Since it is agreed that such education and training is going to be lifelong, workers should be able to observe some progression in the level of training to which they are exposed.

It is important that attention is paid to the constant evaluation of such programmes to ensure that the material which is presented has continuing relevance and validity.

Most trade union's education and labour programmes tend to de-emphasize academics and certificates of participation and attendance are provided by the union's executives.

3.6 Cadre/Cohort Training and Education

In addition to broad rank and file training, trade unions have to build the capacity of special cadres/cohorts within the organization, in particular staff, shop stewards, executive members and committees, as these provide the main leadership pillars in the organization.

Staff Training

Full-time trade union staff are usually skilled and trained persons. Educators, researchers, negotiators, accounting and financial staff are expected to be qualified in their areas of expertise, as well as office staff who function as secretaries, computer operatives, cashiers, clerks and receptionists.

Whatever the level of training, staff should be constantly exposed to continuous learning so that the organization typifies a learning rather than a knowing organization.

Opportunities for cross-training and multi-skilling staff can lead to improved performance and can bring multiple benefits to the membership.

Full-time staff benefit not only from exposure to formal academic programmes but should be encouraged to participate in high level meetings, conferences, study tours, task forces and other learning opportunities, especially when they are held away from the workplace, and also in countries

other than those where the staff live. Staff exchanges are also valuable learning experiences.

While it would be reasonable to request that trade union staff should be conscious of their own personal and professional development, and should plan their own training and education programmes, it is expected that trade unions will provide facilitatory leave arrangements to assist staff.

There are several instances of trade union staff migrating to take up business and career positions after they have been able to benefit from extensive patronage by the trade union to facilitate and enhance their personal development. This should not be a deterrent to the provision of higher education for trade union staff as it is clear that the state and the private sector have a clear advantage in providing education at the highest levels for their leadership, the counterparts of those in the trade union movement.

Previously, Caribbean trade unionists were given scholarships by trade unions operating from Europe and America, among others, which helped to deepen the exposure and qualifications of Caribbean trade union leaders. Such scholarships have now generally disappeared. The growth of the University of the West Indies created the opportunity for trade unions to negotiate such scholarships from that institution, replacing those formerly given by overseas bodies. In recent times, there have been projects developed to facilitate building the capacity of trade union staff to cope with the challenges of globalization.

Shop Stewards

Shop stewards are fundamental to the democratic functioning of trade unions. However, as they achieve their status through the democratic process of elections, their body is subject to change and renewal on a relatively frequent basis, in organizations which are vibrant and dynamic. Indeed, in a situation where a group of shop stewards retain almost oligarchic control of a branch or division, this may appear as either a sign of competence and effective leadership or, conversely, or complacency and inaction.

The training of shop stewards is invaluable for the progress of the trade union as an organization, as many of the roles and functions of the institution are performed through these officials, in conjunction with the executive and staff.

Shop stewards should be expected to perform vital roles as recruiters, negotiators, grievance handlers, and administrators at the branch and divisional levels of trade unions.

Shop stewards should be perceived as a potent area for recruitment to union staff. Their skills should be sharpened to the extent that they can

replicate much of the work that should be done by staff and can perform all of the work that is required at the branch and divisional level.

Committees

Trade unions should develop several committees to help in the democratization of the union and for advancing the cause of the worker. These committees may be based on various focal areas eg youth, gender, retirees, political action, organizing and education, among others. In addition, other standing technical committees may be established, eg. consumers, price monitoring, investments, property management and financial, to mention a few.

It is essential that these committees be provided with the requisite training and education to function effectively. Training courses for these groups may embrace:

- concentrated knowledge required for the specific area;
- team work and group experiences to generate ideas and develop attitudes required for the tasks; and
- opportunities to develop new appropriate skills and to practise those already acquired.

Delivery Systems

Most Caribbean trade unions have developed basic education and training programmes provided at union offices, occasionally at workplaces, and sometimes at locations away from either the trade union or the workplace. Methodologies include traditional chalk and talk as well as group work, simulations, role-playing and other participatory strategies.

At the highest level, a number of labour colleges and other worker training institutions exist in the Caribbean. These vary in their objectives and modes of delivery. The Barbados Workers' Union Labour College, and the SIVIS of Suriname are prototype labour colleges based on membership training, as is the Jamaica Joint Trade Union Education Research and Development Centre. The Crichlow Labour College of Guyana, and the Cipriani College of Labour and Co-operative Studies of Trinidad and Tobago are more broad-based with focal points that include academic and professional training with biases towards preparation for employment in the workplace.

In some countries, the state provides adequate training for technical, vocational and academic training at all levels. Trade unions may not consider it necessary to spend their funds in areas of duplication with the state. However, where a vacuum exists, trade unions should seize the opportunity and continue to make an important contribution to the national educational and training grid.

Recently, emphasis is being placed on harmonizing the role of these labour institutions.

Much consideration is also being given to the adoption of technology to provide distance education to reach a much wider spectrum of trade union membership. In addition to the use of printed modules, consideration is being given to the use of audio cassettes, video cassettes, computer-based learning, audio-conferencing, video conferencing and computer conferencing to reach broader numbers.

The trade union membership in the Caribbean is very enthusiastic about education and training in the information and communication technologies, particularly in the use of the computer, Internet and related technologies. Cooperative agencies such as the Commonwealth Trade Union Council has ensured computer training for most trade union office staff, and also introduced several members to basic trade union training.

The Caribbean trade union movement must continue to stress the importance of education and training and the following focal areas must be paramount in their consideration:

- capacity-building for staff and leadership cadres/cohorts;
- harmonizing the delivery of training in the region;
- coordinating work on certification and accreditation of labour education;
- provide for continuous training and retraining of members;
- focus on values education-building on the culture of the trade union as an institution which places emphasis on issues such as equity, freedom and justice; and
- supporting the role of the International Labour Organization and the international labour movement in their call for emphasizing Fundamental Principles and Rights of Work, Decent Work, Employment for all and building workplaces on “high-road” policies and social dialogue.

3.7 Research Trade union research is a vital area of the organization. Traditional research activities can be greatly enhanced by the use of the computer and the Internet. The major functions of research departments should include:

1. Collecting, storing, retrieving, collating, and providing information on trade union activities such as collective agreements, membership, wages and conditions of employment.
2. Conducting, analysing, interpreting and assessing surveys and their results on a variety of issues, including the attitudes of members and other groups towards the trade union.
3. Responding to external requests for information about the trade union, including completing questionnaires and other analytical tools.
4. Preparing macro economic analyses to provide guidance to other leaders in the union.
5. Preparing position papers for the trade union leadership for negotiation and other purposes
6. Preparing reports on aspects of trade union activity for consumption by the membership.
7. Using the Internet and other sources to collect information on areas of interest to workers.

8. Interpreting cost of living information and other specific labour market information.
9. Acting as internal audit for union processes such as timely submission of bargaining proposals.
10. Assisting in the preparing of collective agreements.
11. Assisting in the trade union's education programme.
12. Helping to write monographs and other information aides.

The rapidity with which information is being generated is a major challenge for trade union leaders. Most of them require research assistance, not only to provide the most recent and relevant information, but also to ensure that it is packaged for the use of the leader.

3.8 Communications

Communications is an important function in ensuring that any organization works effectively. Trade unions need to ensure that there is constant communication between the centre and the periphery of the union organization, so that its members are kept abreast of its programmes and policies. It also has to ensure that it reaches out to a wider constituency which includes non-members; indeed, to the wider public which constitutes a pool of potential members.

Regular, organized staff meetings, retreats, planning sessions are important for central communication. Information-sharing, freedom of discussion, frankness and openness should characterize such sessions, which should be perceived as opportunities for the organization to grow.

Trade unions utilize press statements, press conferences, advertisements, bulletins, magazines, radio and television programmes to get the union's message across to the public.

The newspaper in most Caribbean countries tend to be biased towards business. In many instances, radio and television stations are owned by the government, or by the few businessmen who are sufficiently friendly to government to receive licences to operate.

Trade unionists should invest in full-time public relations officers who have the expertise to develop professional relationships with the media.

Those trade unions who make such an investment are able to receive significant dividends in the form of a positive image especially at times when they are engaged in highly visible and audible situations.

In some countries, there is a claim that members are not participating sufficiently in branch and divisional activities. This may be caused by a variety of factors:

1. The check off-system and agency shop positions create a situation where members do not have to visit the union to pay their dues.
2. There is a growing apathy to meetings as people become more accustomed to watching television and sitting before computers.

3. Branch and divisional meetings are not always sufficiently advertised.
4. The agenda of the meeting does not excite interest.
5. The timing of the meeting clashes with other activities.

General meetings are probably the most important means of communication with the membership and provide important opportunities for staff members and shop stewards to contact the rank and file.

The meetings which are most successful relate to the collective bargaining exercise, and those for the election of officers. These should be carefully planned and executed.

The use of the computer has to be factored into communication as more workers go on-line. Several trade unions now have web sites and provide information for members. The management of web sites and the responsibility for sending and receiving e-mail are now important functions in some trade unions.

Trade union information systems are very important in the union communications network. With the increasing need for networking among unions in the Caribbean and globally, communication will increase in importance in the trade union organization.

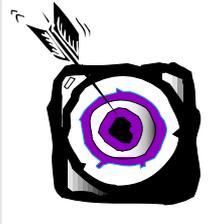


Exercise

1. ***Draw an organizational chart for your trade union.***
2. ***Describe a trade union with which you are familiar in relation to how it performs the following functions: planning, organizing, staffing, directing and controlling its processes.***
3. ***How should trade union leaders differ from the management of business institutions?***
4. ***Should trade union development reflect the purposes for which trade unions exist.***
5. ***Should trade union staff be multi-skilled?***
6. ***How important are education, research and communication to the trade union?***
7. ***What factors can lead to tensions between the trade union centre and the periphery. How can these tensions best be resolved?***

Module 4

Types of Trade Union Structures



Objective

To examine how trade unions have been developed to promote the process of recruiting, organizing and representing employees covering diverse industries and occupations in the Caribbean.

The term structure refers to the different types of union based on their recruitment patterns and the work areas from which membership is drawn.

When the Moyne Commission visited the Caribbean in the aftermath of the disturbances of the 1930's, Sir Walter Citrine and Morgan Jones, two members of the Commission, and a senior member of the British Trade Union Congress, advised the trade union leaders that they should encourage the development of a general or umbrella type trade union in order to:

1. concentrate the solidarity of workers;
2. reduce chances for union rivalry; and
3. counter the development of a non-democratic organization.

4.1 Types of Structures

In the early 20th century when trade unions were being established, the major models available were:

- (1) **the craft union**, which was either based on a single craft or on multiple crafts, or one that was spread across an entire industry relating to similar crafts. It became known as an industrial union in a horizontal arrangement;
- (2) **the industrial union**, which was vertically structured in a single industry and existed across a geographical area; and
- (3) **the white collar union** which existed mainly for public sector workers, many of which started as associations.

The majority of unions in the Caribbean followed the Citrine and Jones' advice and formed general unions, without occupational or industrial boundaries.

Others formed federations through which trade unions could co-operate and co-ordinate their activities.

In some instances, enterprise unions have started as associations and have broadened from membership at a particular workplace.

4.2 Examples of various union structures in the Caribbean are given below: **Caribbean examples**

Craft

- Bahamas Commonwealth Electrical Workers' Union
- Bahamas Guild of Artists
- Grenada Seamen and Waterfront Workers' Trade Union

Industrial

- Aruba Hotel Workers' Union
- Independent Oil Workers' Union of Aruba
- Bahamas United Brotherhood of Longshoremen's Association
- Bahamas Hotel, Catering and Allied Workers' Union
- Guyana, Mining, Metal and General Workers' Union
- All Trinidad Sugar and General Workers' Union
- Steel Workers Union of Trinidad and Tobago
- Oilfield Workers' Trade Union of Trinidad and Tobago

White Collar

- Antigua and Barbuda Union of Teachers
- The Public Workers Union of Aruba
- Bahamas Professional Pilots Union
- Union of Tertiary Educators of the Bahamas
- Barbados Union of Teachers
- Barbados Registered Nurses Association
- Belize National Teachers Union
- Bermuda Public Services Union
- Grenada Union of Teachers
- Guyana Teachers Union
- Jamaica Civil Service Association

General

- Antigua Trades and Labour Union
- Antigua Workers' Union
- Barbados Workers' Union
- Bermuda Industrial Union
- Grenada Technical and Allied Workers' Union
- Guyana General Workers' Union
- Guyana Agricultural and General Workers' Union
- Bustamante Industrial Trade Union
- St Kitts-Nevis Trades and Labour Union
- National Union of Government & Federated Workers of Trinidad and Tobago

Federation

- General Trade Union Confederation of Aruba
- Curacao Federation of Workers
- Windward Islands Federation of Labour
- Progressive Trade Union Federation (C-47) of Suriname
- ‘De Moederband’ of Suriname

Enterprise

- LIAT Workers’ Union of St Vincent
- Bank Employees Union of Trinidad and Tobago

Craft Unions

The tendency towards the formation of craft unions has been strongest in countries such as the Bahamas and Trinidad and Tobago where skilled and trained workers were willing to develop unions on behalf of themselves. Few craft unions have remained completely for a single craft and tend to become more multi-craft in a battle for economic survival and relevance, as the different craft areas have encountered difficulties in modernizing periods.

Industrial Unions

Like craft unions, industrial unions also depend on changes in the economy. Some industrial unions in areas such as sugar and oil and dockwork has suffered significantly as a result of technological changes.

White Collar

White collar unions are some of the most vibrant and successful in the Caribbean. Many of them are public sector unions, and except in periods of structural adjustment, benefit from financial security as their members are generally able to pay union dues which are deducted from a central source.

There are still many white collar workers in several areas of the Caribbean, especially in supervisory and management positions, who are yet to be organized into trade unions.

General

General or blanket unions which emerged from the early post-Second World War period continue to dominate the trade union scene in the Caribbean. Several unions which started out as craft or industrial unions later expanded to include other types of members and have thus evolved to become general unions.

Federations

Federal types of unions are most prominent in the Dutch areas of the Caribbean.

Enterprise

Enterprise unions are a distinct minority and very few of them exist in the Caribbean.

Rivalry

The existence of several general unions in various territories has led to union rivalry and struggles for territory in some countries. However, this has not been a divisive issue in the Caribbean in recent times.

The reality is that whatever the structure of the trade union, bargaining at the enterprise level is overwhelmingly the predominant pattern of the region. In some instances, such as in the hotel sector, sugar, and the public sector, trade unions attempt industrial agreements which cover the entire sector. Jamaica has long negotiated enterprise agreements, where different unions negotiate agreements with multiple employers in the same area.

Trade Union Centres

Among the Trade Union Centres which exist are the Ravaksur of Suriname, the CTUSAB of Barbados, the NATUC of Trinidad and Tobago, the JCTU of Jamaica and the TUC's in Grenada, Guyana and the Bahamas. These are usually secondary, policy-making bodies.

Corporatism

In recent times, there has been a steady movement to establish trade union centres in the various countries.

This act of centralization is leading to the formation of social partnerships and corporate approaches to industrial relations, where social compacts and protocols are establishing macro-frameworks for dealing with industrial and some non-industrial issues.

4.3 Caribbean Congress of Labour

Since its formation in 1960, the Caribbean Congress of Labour (CCL) which has antecedents from 1926, has been the major regional labour organization in the Caribbean. Its main objectives have been:

1. to encourage the formation of national groupings and/or centres of trade unions;
2. the defence of trade unions against infiltration and subjugation by totalitarian forces;
3. to build and strengthen ties between Free Trade Unions of the Caribbean and those of the rest of the hemisphere and the world; and
4. to maintain and develop a regional clearing house of information and research on the problems of trade union organizations.

In the fulfilment of these four major aims, the Caribbean Congress of Labour has generally been successful. The formation of national trade union centres has proven elusive in areas such as Saint Lucia, Antigua, Dominica and Bermuda; in areas such as Trinidad and Tobago and the Bahamas, more than one national centre operated at some time, with difficulty in bringing the centres together. In Guyana, there has been some splintering from the centre.

Some of the issues which have contributed to the difficulty of forming the national centres include:

1. political differences between the unions;
2. ideological differences; and
3. personality conflicts between leaders.

The position of the Caribbean Congress of Labour has shifted and in recent times the Congress has been trying to establish a relationship with Cuba, based on pragmatic rather than ideological consideration. The CCL continues to subscribe to the policies of the International Confederation of Free Trade Unions (ICFTU), of which it is an affiliate, and to the policies of democracy.

Through its connections with the ICFTU, ORIT and through its links with other trade union institutions like the AFL-CIO and the Canadian Labour Congress, the CCL continues to create links with the world's free labour movement.

The Caribbean Congress of Labour has played a predominant role in training Caribbean labour leaders in education and research and in building capacity.

The financial difficulties of the organization, based on weak support from its affiliates has been a problem. It has played a great role in using its connections with the International Labour Organization (ILO) and with funding agencies to continue its outreach programmes to members.



Exercise

1. Do you think that Caribbean trade unions are likely to merge into larger entities in the future?
2. What advantages could larger general unions have over craft and industrial unions?
3. What sources of financing could assist the Caribbean Congress of Labour to meet the needs of its members?
4. What challenges are there for mergers of Caribbean trade unions?

Module 5

Organizing workers



Objective

To discuss strategies, tactics and issues impacting on organizing activities.

5.1 What is meant by organizing

Organizing is a process by which trade unions canvas, recruit, consolidate, seek recognition for, formalize into a unionized group, negotiate for, and manage as a bargaining unit.

Organizing is a core trade union activity. Without vibrant consistent organizing, a trade union is unlikely to grow, become economically sound and offer its membership good quality services.

Trade union finances are dependent on organizing. From membership entry fees, trade union dues, and other income from members, trade unions employ staff, build offices, provide transport and function as business entities.

The trade union organizer is a key person in the institution. His role is that of ensuring that the trade union is constantly renewing itself. He should be a multi-faceted person. He is partly a marketing specialist, partly a salesman, an administrator, a negotiator, an educator and a motivator.

Through public relations and marketing, the trade union makes the public aware of its services and activities. The use of the media can be important in bringing an awareness of the role of trade unions.

Trade unions have to be skillful in ensuring that a positive, rather than a negative side of the union is portrayed. Sometimes the negative side suggests that unions are harmful to businesses; that they are supporters of violent action; that they are only for a certain class of workers; that they are no longer relevant to the needs of workers; that all they care about is money; that with good government and caring employers, there is no need to have unions.

These views of the trade union movement are propagandized both overtly and subtly by those who are against the trade union.

Anti-trade union employers propagandize their workers against 'third-party' interventions in the workplace. Trade unions are portrayed as 'the outsider', an unnecessary intruder into the life of the business unit. The trade unions need to counter this type of propaganda at the national or macro level.

Trade unions need to develop their own information dissemination. It is important that trade unions establish their role as important institutions in the labour market, helping to regulate wages and salaries. They should be seen as part of the national interest representing the broad masses of the people.

While the trade union's **monopoly voice** is important, it has to be treated very carefully. There is no doubt that trade union militancy is part of its main attraction to workers. Well-organized and successful strike actions play a major role in getting new members into the movement. Strikes are highly publicized, so that they bring the public's attention to trade unions. Gains from strike action also help to demonstrate what trade unions can do on behalf of workers.

On the other hand, if strikes go wrong, they can leave a negative impact on the public's mind.

The other voice of the union, rather than the "monopoly" voice should be important. Trade unions should publicize the "**beneficial**" voice. This includes concern about the health and safety of the nation; a position against discrimination of any kind whatsoever; a concern for educating the masses about matters that affect their well-being; resolving conflict of all kinds in the nation; and supporting nationalism and unity in their various forms.

5.2 Selling the 'services' of the union

The organizer must be aware of the 'services' he is selling to his client or potential member. What are the benefits to be gained from joining the trade union?

Traditional services include:

- (1) representation
- (2) bargaining for improved remuneration and terms of conditions
- (3) grievance handling
- (4) employment protection.

Members are now demanding additional services such as:

- (1) health care schemes
- (2) pension plans
- (3) discount schemes
- (4) savings, investment, and loan schemes

- (5) access to housing
- (6) travel and recreational services
- (7) educational opportunities
- (8) legal services.

The wider the services that are offered, the broader will be the appeal to potential members.

Once the trade union has developed the services, the organizer's role of selling them to potential members is better accommodated. Organizers should be very familiar with the services offered by the trade union and be able to explain them persuasively and efficiently to prospective members.

5.3 Locating prospective union members

Organizers should be cognizant of where prospective members are to be found - by occupation and by geographic location. They ought to keep a constant watch on the country's economic development. A growing economy is one in which trade union organization will be boosted. The sectors showing growth are those which will provide greater organizing opportunities.

It is often more rewarding to target large and medium-sized economic units, rather than several small ones. Trade unions should conduct thorough research on the targets they have set for themselves. They must know as much as possible about ownership, organization structure, history, linkages, employment, terms and conditions of workers, former relations with trade unions and financial status of the organization.

Organizers sometimes have to 'farm' targets. They sometimes have to realize that initial approaches will not meet with immediate success. They therefore have to develop gradual processes to achieve their target. Meetings in the vicinity of targeted workplaces, passing out trade union pamphlets and brochures, meeting workers at lunch breaks and after work, are all part of the 'farming' type activity.

Where the target exists in an area that has some other companies that have been organized, the organizer can strategize to get assistance in the organizing drive from the workers in the companies that are already organized.

Once a number of potential members show an interest in the union, the *organizing drive* begins to take shape.

The organizer who is allocated to the drive takes responsibility for the team which will complete the process. The organizer will be assisted by an accounts officer to handle dues collection and related matters and an educator to help with socialization.

5.4 Determining the bargaining unit

The organizer has to determine the bargaining unit to be targeted. A bargaining unit is a critical issue in the organizing process. Many drives have failed because the organizer failed to determine the appropriate bargaining unit.

Workplaces usually have 'clusters' of jobs which are similar in relation to:

- (1) wages/salaries
- (2) method of payment
- (3) terms and conditions
- (4) progression
- (5) location
- (6) organization and management and
- (7) job descriptions/position descriptions.

Such clusters may have 'functional' relationships.

Other workplaces may be based on 'hierarchical' structures; for instance, management, supervisory and clerical, and line staff.

In requesting representation for a bargaining unit, the organizer must be extremely careful about a number of factors:

- (1) he must have a clear majority in all of the areas which represent the cluster;
- (2) the bargaining unit must be set out clearly in the letter, naming the job functions; and
- (3) the accounting of dues collected and cards must be done professionally.

In some cases, surveys or polls may be used to determine the union claim.

Employers may use destabilizing strategies to dampen the union's claim:

- (1) delaying tactics of various types;
- (2) termination of employment of known trade union activists;
- (3) threatening to close down; and
- (4) increasing the wages/salaries and improving terms and conditions.

This is a time for resolute action by trade unions. In some instances, there is provision in the law for recognition procedures. In others, custom and practice guide.

5.5 Negotiating a new collective agreement

Provided recognition is gained, the organizer's task of submitting a body of proposals for negotiating a first contract and establishing the machinery for managing the group, become important factors.

A first negotiation is completely different from a regular salary review. It is about establishing a base agreement.

Trade unions should use market surveys to help determine the standard to be set for the new group and try to get a new agreement that is beneficial to the workers.

Establishing a management committee for the new group and training it to understand the legal, economic, psychological and other issues involved

in collective bargaining and grievance handling are serious challenges for the trade union.

The extent to which the delegates or shop stewards are able to establish a working relationship with management depends to a large extent on the initial training they receive.

With the process of negotiating a new collective agreement, as with organizing, comes the need for frequent meetings, some informal and some formal.

Formal meetings, whether of a small group or a large group, must be well prepared. The provision of proper facilities for meetings is important as well as properly prepared agendas.

The success of a meeting to a large extent, depends on leadership and chairmanship. These must not be underestimated. Organizers must be skilled public speakers, adept leaders and must be able to manage meetings effectively.

There are different styles of leadership and of chairmanship. However, there are some fundamental aspects of both that should be considered.

5.6 Organizing Issues

The trade union is an organization in the labour market. Other organizations in the labour market are educational institutions, family planning associations, hospitals, ministries of labour, employment exchanges and agencies, business firms, human resource associations and courts.

The major processes in the labour market include training, recruitment, orientation, grievance handling, collective bargaining, education, advocacy, representation, promoting, transferring, unionizing, separating, conciliating and arbitration.

Some of the major outputs of the labour market are compensation packages, conditions of employment, rules and regulations, databases, activities, programmes and associations.

The values that drive the trade union as an organization include: justice, equity, non-discrimination, freedom, self-reliance, comradeship and progress.

Trade union culture has been associated with the folk or the common people, struggle and adversarial relations, militance, suspicion, doubt and mistrust, bossism, socialism, group behaviour, bible thumping religiosity, resistance to change, anti-academic approaches, 'closed' rather than 'open' approaches to relationships except with narrowly defined areas.

People form the basis of organizations. This is especially true for a membership organization. In the case of the trade union, workers are a

special category of people forming the basis of the union. Workers can be seen as members or potential members. One can perceive of past, current and future workers as part of the planning process.

Trade unions do not discriminate among workers in sociological, political or social terms. All those who sell their labour, mental or manual, or both, are the basis of trade union activity.

The trade union recognizes, however, the tremendous diversity of the labour force, its segmentation according to a variety of criteria including type of employment, age, sex, gender, location, type of business, local or export orientation, industrial vs financial, domestic or transnational ownership, modern or traditional.

Trade unions are wary of the impact of macro-economic factors on the labour market. Inflation, employment levels, national debt, fiscal policy, levels of foreign reserves, trade arrangements and agreements can impact on the trade union.

The functioning of the trade union in a given labour market is impacted by the structure, shape and size of the union. The size of the trade union, inclusive of its paid professional staff and its membership, will impact on its ability to provide quality goods and services. The staff should be able to cover a span and range of roles and functions on behalf of the members. The membership should also provide human resources to complement the staff.

Organizing and organization are the areas which have responsibility for 'growing' the union, maintaining contact between the centre and the periphery, providing many of the outreach services to members, and generally, interfacing with the widest cross-section of the public.

5.7 Why people join unions?

Recent research indicates that workers join unions for a number of reasons - some selfish and personal, some practical and pragmatic, and some philosophical and idealistic.

Sometimes large groups become available for organization because of dramatic or traumatic changes at the workplace. These may include fear of closing, technological change, workplace restructuring, problems relating to safety and health, poor pay and working conditions, or the feeling of not being able to exercise or enjoy basic rights at the workplace. Sometimes workers may be responding to perceived threats in the environment.

In such cases, where the drive to organization comes from the workplace, the organizer must have sufficient skills and experience to convert the drive from its narrow focus into a more complete organization. The initial problem must be dealt with swiftly and satisfactorily.

Establishing contact with 'leaders'; diagnosing the problem; recruitment; establishing a local structure; training the leaders, ensuring an absolute majority; gaining recognition; and negotiating the first contract - must all be handled professionally. Depending on the reason for the drive, the union may have a division that is long-lasting and rewarding.

The Barbados Workers' Union has had several drives initiated by workers. Examples are: Barclays Bank (fear of technological changes and workplace restructuring), Manulife Data Services (repetitive strain injury); N D L (fear of imminent close down); Modutec (dictatorial management and poor wages and working conditions), to mention a few.

Yet it should be recognized that for the disaffected workers to join the union, a number of pre-conditions were necessary:

- (1) they should be aware of the union, its role and functions; and
- (2) they should be confident of the ability of the Union to address their needs and concerns.

The group expression of the will to drive the union can be seen as an aggregate will of the individual expression.

The 'needs' theory

The 'needs' theory can be used to focus on why many individuals join the union. Industrial psychologists refer to 'basic' needs, and to higher order or secondary needs.

For many workers, the workplace is the area which provides for the satisfaction of basic needs.

Money - a wage or salary - is the nexus between the employer and the employee in the workplace. The employer offers 'work', the employee contracts his/her services, skill and effort - and money is paid in consideration.

This contract of employment embraces certain duties and responsibilities which, once maintained, will keep the relationship whole. Breach on either side, if sufficiently grave, can lead to a fracture of the relationship and a parting.

For the employer, constant productive services from employees can lead to greater value added to the organization, the accumulation of wealth and financial stability. The added value in the form of profits or surplus can be used for further investment in the form of expansion of the firm, making new other investments; rewarding stakeholders; and performing civic corporate functions.

For the worker, his wage or salary is an expense to the company. Sometimes workers are able to share in the added value through performance-related or profit sharing schemes.

For the worker, his wage or salary is income to meet basic needs which are predominantly:

1. Food and nutrition
2. Clothing
3. Home and shelter/utilities
4. Transportation
5. Medicine and welfare
6. Education
7. Recreation
8. Protection
9. Sexual and reproductive activities
10. Security

So that if the question is asked “Why do people work?”, the fundamental answer, except perhaps for the very few, would be simple: “To satisfy their basic needs”.

Money - the almighty dollar, becomes a powerful symbol for survival. In our sophisticated modern world, it is almost impossible to survive without access to some form of money.

Today, cash, bills, credit cards, vouchers and other tools are available to most people. The worker’s personality might also extend to assets such as jewelry, equipment, shares, stocks, bonds.

Others have personality in the form of cars, buses, taxis and other vehicles. Some have realty in the form of land, houses and apartments.

Workers distinguish between their ‘needs’ and their ‘wants’. They establish their ‘comfort zones’ and decide on the type of capacity-building that is necessary for them to achieve their objectives.

It is largely through compensation received for services rendered that workers are able to provide for their needs, meet their commitments and provide for the accumulation of personality and realty.

Other needs

All workers do not join trade unions to satisfy their basic needs. Others have higher order needs to be satisfied:

- (1) Recognition
- (2) Self-Actualization
- (3) Self-esteem
- (4) Peer Respect.

What programmes can trade unions organize, and what services can they offer to help members achieve these needs, and attract potential members who have such needs?

5.8
The law and
the organizing
process

We have already shown that ILO Conventions No. 87 and No. 98 provide a sound basis for the right to organize workers and bargain collectively.

Whenever governments are party to an ILO Convention, they ought to introduce specific laws which are in harmony with the ILO Conventions. In Jamaica, the Labour Relations and Disputes Act of 1975, and one of its sections specifically states that workers have the right to be organized into trade unions, provided those unions comply with certain procedures which can lead to the taking of a poll - a vote amongst the workers to whom the union is directing its efforts.

In voluntarist systems, there may be no law to determine recognition. The Labour Department may employ a survey process rather than a polling process. It is always necessary to be aware of the law as it relates to organizing.

Union Internal Procedures

The Union should have a form that is used in the recruitment process. The form can be a vital source for the collection of data about members.

Most unions require an entrance fee, as well as weekly or monthly contributions. Some union fees are flat, others are a percentage of the workers' wages/salaries.

Once members join, there should be a close relationship between the organizer and other union departments. The accounts section must ensure the proper keeping of all records. The education department should begin its task of 'unionization' which is a critical function of organizing.

Management

The organizer must recognize that until the poll is completed, or the survey conducted in favour of the union, "all's fair in love and war". The company may try a number of "union-busting tactics" to destabilize the union's efforts. These may include: dismissing local trade union leaders; laying off workers in the bargaining unit; increasing pay and improving the conditions of workers; refusal to respond to union approaches; threatening to leave the island; and all out propaganda war.

Organizers must ensure total discipline throughout the organizing drive. Particularly in the face of management adversarial strategies, the workers must remain fully under the guidance of the trade union organizer.

Trade unions must extend organization into sustainable areas, especially among the growing numbers of knowledge workers. They also have to establish organizing relationships with small business entrepreneurs.

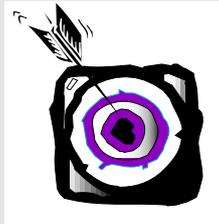


Exercise

1. What qualities should a successful organizer possess?
2. Having gained recognition at a workplace, how can trade unions continue to improve membership recruitment in that bargaining unit?
3. What determines a bargaining unit?
4. List and discuss the strategies you would use in organizing workers in:
 - (a) Industry
 - (b) Agriculture
 - (c) Financial services
 - (d) Hotels.
5. It is important that the union is acceptable at the national or micro level, if it is to be impactful at the micro level. Does your union have a strong impact at the macro-level? How does it manage its marketing and public relations process?
6. Discuss the different styles of leadership and chairmanship and how they can impact on the group.

Module 6

Non-traditional Roles



Objectives

- (1) *To examine the roles of trade unions in non-traditional activities.*
- (2) *To recommend strategies for capacity-building for trade union representatives in non-traditional leadership roles.*

6.1 Non-traditional roles

Trade unions in the Caribbean have always been at the forefront of expanding the participatory process. It is quite normal for trade union representatives to be invited to become directors of public institutions including social security boards, utility boards, as well as serving on various committees. Additionally, in some countries, such as Grenada, the trade union has a dedicated position in the country's Senate.

These are positions of extreme sensitivity and responsibility. In such positions, trade union leaders have to be mindful of the various areas in which they are required to build their competence and capacity:

1. the law relating to the particular enterprise
2. the law relating to meetings
3. communication and interpersonal relations skills
4. networking skills
5. analytical skills
6. research skills
7. planning skills.

The many areas of concern which may arise in the performance of these functions may relate to matters of:

1. Policy
2. Programming
3. Finance
4. Organizational Design
5. Economics
6. Procedures.

In each situation, the workers' representative must be conscious that there is a fundamental commitment to the organization and the membership that

should guide all decisions. The workers' representative should therefore be in constant communication with the union leadership, and with the mass of people in the union, especially where critical policy programming, financial and other changes, likely to impact on the workers, are intended.

An example can be taken, for instance, from the representation on such a fundamental institution as a country's social security system. In most of our Caribbean countries, our social security systems are undergoing some re-evaluation. The major areas affected are:

1. Pensions
2. Sickness and Injury Benefits
3. Unemployment Insurance.

These are important safety nets and are clearly priority issues for trade unionists.

The sustainability of such schemes and their cost to the society are very important issues. In several countries, they are a source of investment capital that can be very important.

It is to be expected that workers' representatives on such boards should be provided with the necessary training to deal with the complex actuarial, investment, legal and other issues.

Caribbean trade unions should develop standard, certificated training modules for those who intend to serve in such capacities.

6.2 Trade Union/ Worker-owned Enterprises

Trade unions and/or worker-owned enterprises are growing in the Caribbean and include petrol stations, garages, cooperatives, health services, messenger and janitorial services, distributive services, industrial relations advisory services, postal services, crafts, among others.

The development of these institutions pose significant issues from a trade union/industrial relations perspective.

One of the first considerations is that the highest standard of performance must be encouraged. If such organizations succeed, they will be examples of excellent public relations and marketing tools for trade unions. However, if they fail, the negative impact may be disproportionately emphasized.

They also pose a serious challenge in that where the workers perform in capacities as employees/shareholders/and union members, they have to be trained to operate efficiently and responsibly in each function, and minimize the conflicts which can arise.

The salaries and terms and conditions in such organizations should be clearly established within the market value. Any attempt to make them too high to set a false market leadership role can lead to distortions and

economic failure. Any attempt at setting rates and conditions below the market value can lead to claims of exploitation.

Trade unions would find it extremely embarrassing if workers in their organizations have recourse to frequent industrial action or to a high rate of labour turnover. This means that the management style should cater seriously to problem-solving and conflict resolution strategies.

Managers and supervisors in these workplaces should have training in human resource management, record keeping, accounting, communications, marketing, business finances and in conducting meetings.

They also have to develop contacts with various government and private sector agencies, particularly the government regulatory agencies. Assistance should be sought from professionals when this is necessary.

Such businesses should have well considered public relations policies to present themselves well to the public.

Another area of concern is a tendency to appoint staff based on subjective criteria. In the recruitment of staff, care must be taken to ensure that there is a match between skill sets and the tasks to be done, and that the proper attitudinal qualities are met.

Trade unions should be encouraged in expanding their roles in these areas. They provide opportunities for learning experiences for trade union officers and members. They get the chance to see business 'from the other side', and can sharpen their approach to integrative rather than distributive bargaining approaches.



Exercise

1. Develop a report on non-traditional activities in which your union is involved.
2. Prepare a project recommendation for a trade union or worker-owned business you would like to see developed.

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Trade Union Administration

A Caribbean Workers' Education Guide

Robert L. Morris

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Preface

The management of trade unions in the challenging environment in which they have to operate today requires skills which were previously frowned upon by trade unionists. These skills are basically the same as are required to run any modern day organization effectively. Financial management, accountability to members, research and development, organizational and negotiating skills, and planning for the future of the organization are some of the approaches which successful trade unions use.

Globalization, the demands which are made on trade unions by their members and the new industrial relations environment which is emerging, have all had the effect of forcing most of the trade unions in the Caribbean to modernize their administrative structures and their approaches to labour/management relations so as to cope or keep pace with the changes which are taking place.

Mr Robert Morris, Deputy General Secretary of the Barbados Workers' Union and its Director of Organization actively participated in the delivery of seminars in the ILO/DANIDA (International Labour Organization/ Danish International Development Agency) Project for strengthening trade unions in selected countries in the Caribbean. This Manual is an output from the Project and has been developed by Mr. Morris.

Funding for the printing of this Manual was co-shared by the Workers' Activities Bureau (ACTRAV) of the ILO and by PROMALCO (Programme for the Promotion of Labour/Management Cooperation) at the enterprise level – a US Department of Labour Project - which is being managed by the ILO Caribbean Office.

This Manual captures the essentials for effective trade union administration in a modern environment and through exercises at the end of the chapters, seeks to reinforce on the trade union practitioner the importance of the approaches which have been highlighted.

This publication is one in a series of Workers' Educational Manuals that have been developed under the guidance of Mr. Evelyn Greaves, Senior Specialist, Workers' Activities and produced by the ILO Caribbean Office.

Mr. Willi Momm, the Director, ILO Caribbean Office (1997–2002) gave every encouragement possible for the development of the series.

Luis Reguera
Director a.i.
ILO Caribbean Office



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