

Two Pathways of Union Leadership for Participation

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In this paper a model is proposed for effect of union leadership on union member attitude formation which in turn leads to union member participation. This effect is being explored in further detail through mediation of human drives. Two pathways for union participation are proposed such that transactional leadership forms the attitude towards union instrumentality through activation of 'drive to acquire' and 'drive to defend' and transformational leadership leads to the union commitment through activation of 'drive to bond' and 'drive to comprehend', and finally both leads to union participation. It is proposed that the effect of both leadership styles is moderated by favorable industrial relations climate.

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Introduction

Union participation has been studied for many years. Union participation is about not only emotional involvement but also carrying out certain activities like supporting the union in ways ranging from more formal activities (e.g. attendance at meetings, voting in elections) to more informal activities (e.g. speaking well of the union to others, assisting others in the workplace) (Kelloway, Catano, & Carroll, 2000; Sayles & Strauss, 1953). Different antecedents of union participation have been studied ranging from members' attitude like union instrumentality, union commitment, union loyalty, and members' perceptions like perceived union support, perceived industrial relations climate, and their relation to the type of union leadership whether transformational or service leadership. The link between union participation, members' perception about the union and the union leadership has been established (Hammer & Wazeter, 1993). Further it was believed that the conceptual and empirical work on the psychology of leadership, attitudes and involvement in the unions would benefit from the increased knowledge about unions as institutions and with the additional knowledge of the industrial relations theory (Hammer, Bayazit & Wazeter,

2009). Union Leadership has been identified as one of the most important factors for union renewal (Levesque & Murray, 2006). Thus in this paper we are exploring how union leadership contributes to the participation of union members through his/her attitude formation. Fullagar, Clark, Gallagher, and Gordon (1994: 517) mentioned the increasing need for understanding the proximal explanation of leadership in explaining the attitude formation of the rank and file by stating that “little has been done to understand the process of attitude formation and the way in which attitudes toward unions are shaped”; this gap still exists. Therefore, in this paper the linkage of leadership – attitude formation through the connection of “four human drives” is being explored (Lawrence, 2010). This paper makes three important contributions to union leadership literature. Firstly, this is an attempt to integrate transactional and transformational leaderships to examine their effects on union participation through two different paths namely union commitment and union instrumentality. Secondly this is the first time that a closer study of underlying drives in human motivation and decision making have been done to establish the linkage between union leadership and union member attitude formation and union participation. Thirdly this study also elaborates the effect of favorable industrial relations climate on each style of union leadership and its consequences on union participation.

Two Pathways

Members’ participation in union has been emphasized as one of the key out-

come variables in industrial relation studies. Different studies have tried to establish the link for explaining the participation of members in union activities. For the explanation of union participation researchers have tested the attitude formation (union commitment and union instrumentality) of rank and file (Bamberger, Kluger & Suchard, 1999; Fullagar, 1986; Fullagar & Barling, 1989; Gordon et. al, 1980; Kelloway & Barling, 1993; Kelly & Kelly, 1994; Thacker, Fields, & Barclay, 1990). Few studies have even taken this further to explain the process through effect of leadership i.e. leadership leading to attitude formation of rank and file and that results into participation of union members (Batstone, Boratson & Frenkel, 1977; Clark, 1988; Hammer et al., 2009; Metocchi, 2002; Nicholson, Ursell & PBlyton, 1981; Peck, 1963). Clearly two separate pathways can be identified from literature review, one passing through ‘union instrumentality (transactional) to union participation’ and the other passing through ‘union commitment (affective) to union participation’.

Sayles and Strauss (1953) proved that union participation is affected by not only union instrumentality but also union commitment. Newton and Shore (1992) used (Weiner, 1982) model of differentiating instrumental motivation (union instrumentality) and organizational commitment (normative and moral commitment) and secondly O’Reilly and Chatman (1986) model of psychological attachment (compliance to internalization) to propose that participation can be either instrumental-calculative or it can be normative-based on mor-

als. He further claimed that instrumental attachment is short term and would change according to situation while ideological commitment is long term. Chan, Snape and Redman (2004), Sverke and Sjöberg (1995) and Sverke and Kuruvilla (1995) categorized commitment as affective commitment based on commitment that is a sense of shared values, identity and pride in the union, and that of instrumental rationality-based commitment. Schein (1980) described labor unions as utilitarian and normative organization. As a utilitarian organization union provides different benefits to its members as collective bargaining, security, fringe benefits and as normative organization laborers have moral involvement and belongingness to union. Sjöberg and Sverke (2001: 99) defined instrumental attachment “as a calculative bond to the union based on cognitive appraisals of the costs and benefits associated with membership, and ideological attachment as commitment to the union based on member-union value congruence.” They validated union instrumentality and ideological commitment as two separate constructs. We are considering them as two separate paths for union participation for this paper. According to Rousseau (1989 :121) “two forms of unwritten contracts derive from relations between organizations and their members. Psychological contracts are individual beliefs in a reciprocal obligation between the individual and the organization. Implied contracts are mutual obligations characterizing interactions existing at the level of the relationship”. Again two pathways exist for union participation, one the transaction based and the other transformational based. Thus union rank and file

attitude has been clearly separated out between the two paths one which is based on transaction and exchange i.e. ‘union instrumentality’ and other which is based on high level affective involvement i.e. ‘union commitment’.

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These two different paths can originate from two different types of leadership that is transactional leadership and transformational leadership. Stewards, local union presidents and national union leaders have been studied under union leadership. Steward is mainly attributed with grievance handling work. He is considered as the back bone in grievance handling process. (Catlett & Brown, 1990). According to AFL-CIO (1999) steward’s manual, he is a communicator, an advocate, an organizer, a problem solver, a mediator, and a counselor as well as an interpreter and enforcer of the contract (Chang, 2005). When facing workplace, social, or political issues, union stewards may perform multiple roles, assume multiple identities, and adopt various problem-solving strategies, with different ideological underpinning. It has been pointed out that all the three theories – social conflict theory, structural functionalist theory, and rationalization theory play a major role in defining the role of stewards as leader.

While rationalization theory is closer to explanation of transaction aspect, social conflict and structural functionalist theories are closer to transformation aspect. "Transactional leaders are servants of bureaucracy, providing short-term material incentives to followers. They are associated with instrumental, goal-oriented behavior on the part of individual members. They are concerned with exchange and reciprocity" (Cregan, Bartram & Stanton, 2009:704). Transactional leaders provide union services to workers; in response, workers provide membership and support. The paid officials of the post-war years, therefore, typify transactional leaders in trade unions. In contrast, a mobilizing union expects local union representatives to display the characteristics associated with transformational leaders. They do this by attaching individual members' participation in the union to a collective social identity, thereby strengthening collectivism (Conger, Kanungo & Menon, 2000; Cregan et al., 2009; Kelly, 1998). Metocchi (2002) also points out that for perception of supportive climate service leadership is important while for socialization process and early attitude formation transformational leadership is important. G. Burns, Daniels, and DeAngelis (1987) found that union leaders are prominent in combination of selling and participating style and situational leadership is the most appropriate one. Block (1980) proved that both organizing and representation are important functions for union leadership and in different phases union allocate different resources for both the functions. Strauss and Sayles (1952) described that although union leaders are

classified as visionary idealists they spend most of the time in day to day work solving the problems in their plant.

Based on Newton and Shore (1992) typology of union members we can suggest that effective transformational leadership leads to expressive members, while effective transactional leadership leads to instrumental members, but both the leadership together lead to 'identifiers' type of members. Miller and Rosen (1957) classified stewards' function as grievance handling, communication and union building and citizenship function which has again the characteristics of transactional functions and transformational functions. A typology for union leadership (stewards) has been created which we can further classify as transaction based and transformation based leadership (Appendix 1) (Batstone et al., 1977; Chang, 2005; Chinoy, 1950; Marchington & Armstrong, 1983; Nigel Nicholson, 1976; Reshef, 1987). Hammer et al. (2009) pointed out that leadership has been studied either as steward's role, or as the effect of transformational leadership or as the effect of service leadership. But no one has taken consideration of all of them together to understand the proper causal linkage. Two different pathways in the attitude formation of union members emerged out from two different types of leadership, transactional and transformational. Thus it is proposed that:

Proposition 1: Two separate pathways exist for union participation of rank and file; one originating from transaction leadership and union instrumentality attitude and other from transformational

leadership and union commitment attitude. Both the transactional and transformational pathways lead to union participation.

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Proximal Explanation

The behavior of local leader is important for fostering positive attitudes towards the union (Thacker et al., 1990) as well as for translating such attitudes or members' favorable disposition to participation in union activities, into actual participation (Nicholson et al., 1981). But then what is the process through which union leadership affects union members' attitude and results into union participation? Hammer et al. (2009) found that leadership is closer to instrumentality and justice and it explains the variance more than union participation. There is closer proximity between what a union leader does and the consequences of union membership for the rank and file than there are between leadership and members' commitment and participation (Hammer et al., 2009). This proximity was tested in relation to justice. The same proximity is being explored along with motivation and drives inside the rank and file. Explanation can be found in underlying emotions which can be further explained through decision making process and trade-off between the human drives. According to Lawrence (2010), economics explains all behaviors with the axiom of rational self-interest; sociology ex-

plains it all with social forces; psychology with the learning that filled the 'blank slate' of the mind; anthropology with the teachings of the local culture; and evolutionary biology with natural selection and our 'selfish' genes. It further explains the human behavior through the phenomenon of four drives. According to Lawrence (2010: 14) there are 4 drives that exist inside the human being, namely,

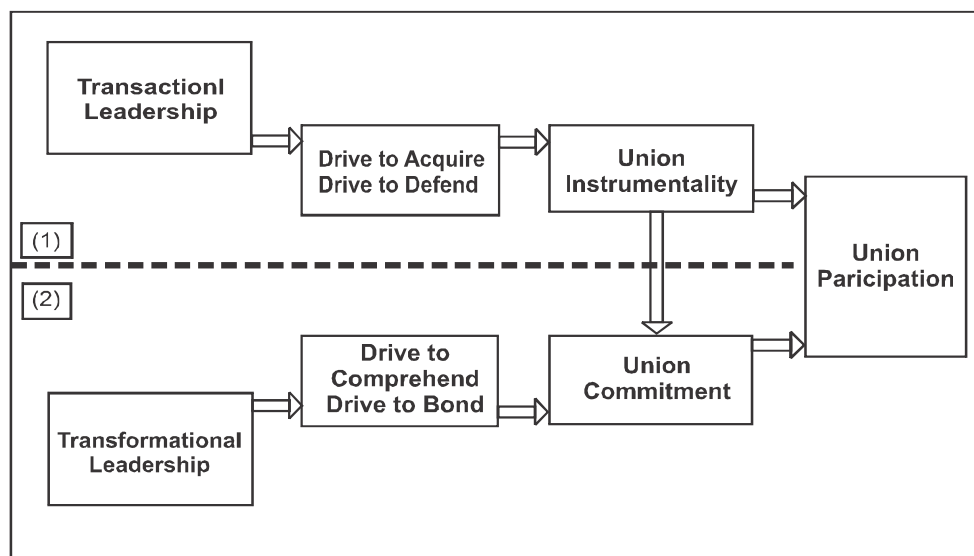
- “The drive to acquire what one needs for one’s survival and the conception and survival of one’s offspring
- The drive to defend oneself and one’s offspring, as needed, from threats
- The drive to bond; that is, to form long-term, mutually caring and trusting relationships with other people
- The drive to comprehend; that is, to learn, to create, to innovate, to make sense of the world and of oneself”

He explains that these drives are expressed through emotions which in turn reflect into action or behavior. These drives are innate—we are born with them. Although they are unconscious, we are conscious of the emotions that they generate. We are using these four drives further in our paper to explain the phenomenon more closely. Maslow’s theory focuses on determining the motivation and behavior of employees by deciphering the basic needs of human beings who are part of a hierarchy (Maslow, 1943). Thus need based motivation can produce closer explanation of this phenomenon. The base of the pyramid - physiological and safety need is more related to drive to acquire and

drive to defend while his other needs – love/belonging, esteem and self-actualization are more related with drive to comprehend and drive to bond. Leadership can be based on charisma (drive to bond) or knowledge (drive to comprehend) as well as on the power to reward (drive to acquire) and punish (drive to

defend) that often goes with hierarchical position (Lawrence, 2010). Thus two separate pathways i.e. transactional and transformational leadership pathways for rank and file participation can be closely explained through four human drives – drive to acquire, drive to defend, drive to comprehend, and drive to bond.

Fig. 1 Transactional & Transformational Path



Transformation Path of Union Participation

Affective commitment directly leads to union participation (Bamberger et al., 1999; Chan et al., 2004). Strength of intra-group identification predicts engagement in union activity especially the difficult forms of participation (e.g. holding union office) (Kelly & Kelly, 1994; Metocchi, 2002). Ideological commitment was identified as one axis (other being union instrumentality) for union participation in his typology of union members (Newton & Shore, 1992). Transforma-

tional leaders develop covenants with others that go beyond the economic, social, or psychological contracts promoted by transactional leadership (Twigg, Fuller, & Hester, 2008). Transformational leadership would appear to be important for achieving strong personal identification with the goals and objectives of the union and inducing members to share the ideology of organized labor (Fullagar et al., 1994). Transformational leadership in union leader is associated with individual member's union loyalty and willingness to work for union (Cregan et al., 2009). The inspirational leadership in the con-

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text of unions organizing has been referred to by Charlwood (2004) and Sharpe (2004). Transformational factors of charisma, intellectual stimulation, and individual consideration are more highly correlated with job satisfaction and organizational commitment than the transactional factors of contingency reward and management-by-exception (Emery & Barker, 2007). Transformational leaders elicit strong respect and admiration from the group and build intense trust and commitment (Bass & Avolio, 1993). Transformational leaders deepen the organizational commitment in followers (Conger et al., 2000). Union commitment and support is best built by appealing to ideology and solidarity rather than purely instrumental motivations (Chan et al., 2004). Procedural justice explained the variance in union loyalty which is a major predictor of union commitment (Morrow & McElroy, 2006). Procedural justice is mainly related with fairness part thus more associated with transformational aspect than transaction. Belief in unionism, fulfilling national and local mission statements are predicting union commitment (Thacker et al., 1990). Evidence was found for direct and positive link between a transformational leadership and work commitment. It was also indicated that transformational leadership has significant and positive relations with both learning climate and learning enthusiasm. It was further recommended

to carry out future research on integration of motivation and commitment within contexts of transformational leadership (Patararechachai & Ussahawanitchakit, 2009). Thus we have used the drive to comprehend and drive to bond to explain this integration. The drive to comprehend is a cornerstone of leadership. To lead a group, the leader must impart or maintain some kind of shared understanding. Shared understandings, along with bonded relationships, are what hold groups together (Lawrence, 2010). Thus transformational leadership creates the union commitment through the activation of drive to bond and drive to comprehend. The need for dignity, mastery, self-esteem, or self-actualization were identified as a manifestation of the drive to comprehend i.e. one needs to make sense of oneself as well as make sense of the world (Lawrence, 2010). Meaningful task content mediated the influence of transformational leadership on affective commitment and consensus also predicted the affective commitment (Korek, Felfe, & Zaepernick-Rothe, 2010). Thus meaningful task content is closer to fulfillment of drive to comprehend and consensus is closer to drive to bond. Transformational leadership affects organizational commitment through psychological empowerment which is closely related to drive to bond and drive to comprehend (Castro, Perinan, & Bueno, 2008). Transformational leadership is more related to moral values such as fairness, honesty, integrity (Burns, 1978) and thus we conclude that transformational leadership mediates the participation through drive to comprehend and drive to bond. It is proposed that:

Proposition 2: Transformational leadership positively affects the union participation which is mediated by union commitment and is activated through drive for bond and drive to comprehend.

Drive to Acquire & to Defend

Union instrumentality was identified as one of the axis (the other being union commitment) for union participation in the typology of union members (Newton & Shore, 1992). Union instrumentality is directly leading to union participation (Chan et al., 2004). Union instrumentality can lead to union loyalty as well as union participation and union loyalty can also lead to union participation (Fullagar & Barling, 1989). Relation of union instrumentality with participation has been explored in detail (DeCottis & LeLouarn, 1981). In this pathway, participation depends upon how much rank and file perceives union instrumental in achieving and securing their goal. The participation of the members is equivalent to return they get. Perception of union instrumentality is explained as willingness to participate depending upon calculation of cost and benefits of each transaction (Klandermans, 1984a, 1984b, 1986). Thus union instrumentality is closely related to effectiveness of transactional leadership of union leader. The link between skills and availability of stewards and rank and members attitude towards grievance procedure has been established and it has further been explained that union instrumentality is based on economic exchange (Clark, 1988). Self-interest theory (Olson, 1971) also explains that members are driven by their self-interest and their par-

ticipation will be based on evaluation of instrumentality. Instrumentality leading to union participation is also explained as social exchange and psychological exchange (Kelloway et al., 2000). Union instrumentality reflects the evaluative attachment. Union instrumentality is connected with transactional style of union leadership (Metocchi, 2002). Leadership and participation relation is mediated through the perception of instrumentality (Hammer et al., 2009). An unfortunate consequence of the tendency to focus on charismatic, transformational and visionary leader behaviors during the past few decades has led to reduced importance of transactional leadership behavioral traits which further have an impact on leadership effectiveness. Transactional leadership, in the form of contingent reward and punishment behaviors, can have substantial effects on administering recognition and discipline in organizational settings (Podsakoff, Podsakoff & Kusova, 2010). The leadership of unions ought to consider an effective grievance system an important collective bargaining issue because of the measure of control it gives union members over the employment relationship (Aryee & Chay, 2001). The components of transaction leadership as defined by Burns (1978) are:

- Contingent Reward (to influence the behavior, the leader clarifies the work needed to be accomplished. The leader uses rewards or incentives to achieve the results when expectations are met)
- Management by Exception (Passive: Correction/ punishment for deviation)

from expected standards proactively monitor the work and use corrective measures to make things happen).

Both these components are closely related to exchange and instrumentality. It was emphasized that transaction leadership is related to justice, equality and liberty and hence we can conclude that it is closer to drive to acquire and drive to defend (Burns, 1978). Lawrence (2010) while explaining drive to acquire and drive to defend says that such a supply and demand curve has led to the dominance in the academic and policymaking worlds of the neoclassical economic model, which takes man to be exclusively motivated to acquire scarce goods in order to maximize his own rational self-interest. Thus we can say that transactional leadership activates the drive to acquire and drive to defend through the instrumentality of reward and punishment and that lead to union participation. Instrumentality based membership is influenced by existence related need (Newton & Shore, 1992). Hammer et al. (2009) claimed that union members feel secured with attachment to union and in return they provide the union participation. Thus we propose that:

Proposition 3: Transactional leadership positively affects the union participation which is mediated by union instrumentality and is activated through drive for acquire and drive for defend.

Union instrumentality directly leads to affective union commitment (Bamberger et al., 1999; Chan et al., 2004). Union instrumentality affects union loyalty which in turn affects the union participation and union citizenship

behavior (Tan & Aryee, 2002). Thus we suggest that although these two pathways are distinct they are connected through instrumentality and commitment.

Proposition 3a: Repeated perception of union instrumentality leads to union commitment which in turn leads to union participation.

Favorable Industrial Relations Climate

Research gap exists on how industrial relations climate impacts the renewal of workplace trade unionism (Redman & Snape, 2006). Extending this argument the gap also exists in relating the union leadership with members' participation in the context of favorable industrial relations climate. Although it was proposed that both transactional and transformational leaderships will affect the union participation, it also depends upon favorable industrial relations climate. Wages, industry characteristics, economic variables, management approach, state laws are a few of the variables controlled by most of the union leadership related studies. Broadly we can define favorable industrial relations climate by including all these variables as wages, state provided security, management approach, industry, economy where overall industrial climate can be very highly favorable (cosmos), or very low favorable (chaos) or neutral. Industrial relations climate has been defined as a subset of organizational climate that pertains to the norms and attitudes reflecting union-management relationships in an organization (Dastmalchian, Blyton

& Adamson, 1989). Our construct is slightly different because we are focusing only on external context (industrial variables which are not in control of union leaders) and not including the union effectiveness inside it. In their study and comparison of two UK based union, Greene, Black and Ackers (2000) identified that managerial strategies and managerial priorities plays important role in union leadership and leadership style effectiveness on union members. A marked deterioration in the industrial relations climate led to changes in union leadership and to an increase in union commitment and participation amongst ordinary members (Redman & Snape, 2006). The poor climate created the conditions for union renewal by bringing forward union activists with more inclusive styles. Barrett (1995) showed that industrial relations climate to be mediating organizational and industrial relations inputs and industrial relations outputs. Thus favorable industrial relations climate plays important role in deciding effectiveness of transactional and transformational leaderships on union member participation. The effectiveness of transactional and transformational leaderships differs in chaos (very low favorability), cosmos (very high favorability) and moderate situations. Wu and Lee (2001) confirmed that the harmony and openness aspects of industrial relations climate had a positive and significant correlation with the effectiveness of participatory management, including the personnel, operational and social matters. Thus under highly favorable IR climate transformational leadership is more effective. Herold, Fedor and Caldwell (2008) found that

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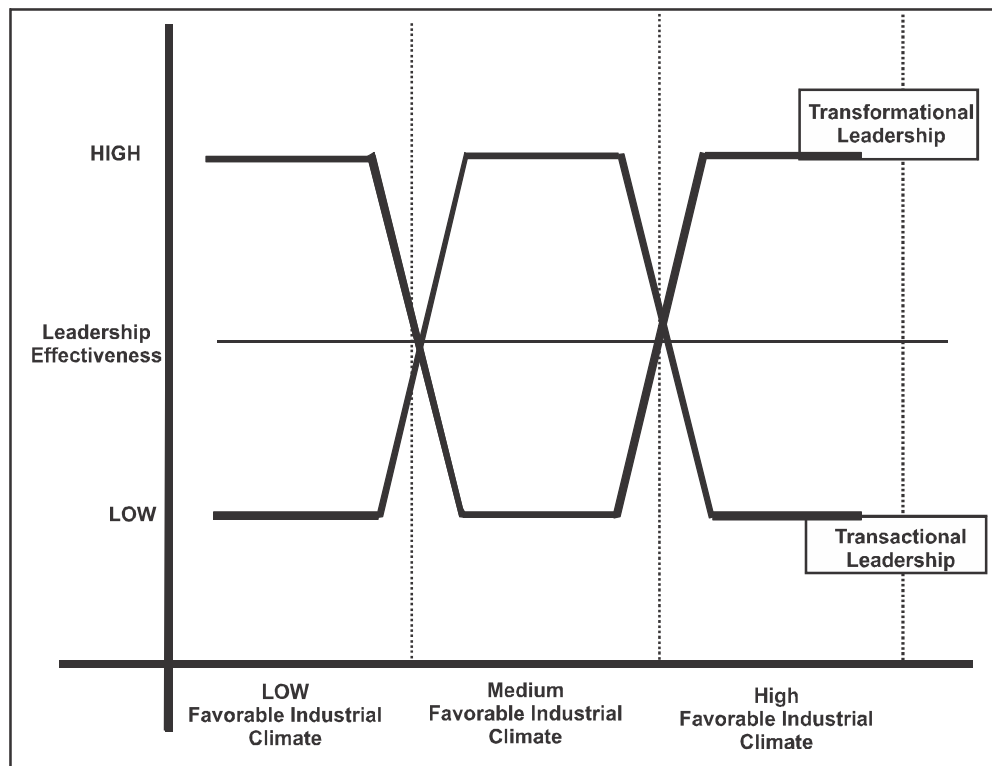
transformational leadership was to be more strongly related to followers' change commitment than change-specific leadership practices, especially when the change had significant personal impact. Thus during chaos and cosmos, when there is significant personal impact through drive for bond and drive for comprehend, transformational leadership is more effective. Cost and benefit ratio defines the union participation by members (Klandermans, 1984a). In chaos or cosmos, due to extreme conditions, this ratio does not make really big difference through additional instrumentality. Thus during adverse conditions transformational leadership is more effective than transactional leadership. Economic factors seem to be one of the major determinants of instrumentally based membership, but these factors have lesser significance for ideologically based members (Newton & Shore, 1992). Economic factors are often outside the control of either the employer or union, suggesting that unions whose chief role is obtaining tangible benefits may have trouble maintaining membership during difficult economic times. Thus transactional leadership is effective during moderate industrial climate where transactional approach is able to maintain the union participation through union instrumentality. During chaos and cosmos, where instrumentality is difficult, transformational leadership through activation of drive to comprehend and drive to bond is effective for union member participation. Scholars have noted a strong

positive relationship for affective union commitment in more adversarial IR climates (Chan et al., 2004). They explained this as a consequence of economic needs being less well satisfied in such circumstances leading to ideological and socialization influences may assume greater urgency under such conditions. Thus during moderately favorable industrial relations climate, with the possible activation of drive to acquire and drive to defend, transactional leadership is effective in increasing union participation through union instrumentality and during chaos and cosmos, difficulty

in instrumentality and high need for meaning and bond, transformational leadership is more effective in increasing union participation through union commitment. Thus it is proposed that:

Proposition 4: Transformational leadership will be more effective for union participation in very high or very low favorable industrial relations climate while transactional leadership will be more effective for union participation during medium/normal favorable industrial relations climate.

Fig. 2 Effect of Favourability of Industrial Relations Climate



Directions for Future Research

- a) As we have proposed the moderating effect of favorable industrial relations climate on effectiveness of each leadership style, similarly other important possible moderating effect as life cycle of union tenure, education, sex, union density, culture can be established.
- b) For a better fit, even participation also needs to be separated out on two dimensions, one emerging from transactional leadership and the other emerging from transformational leadership. Typology of union member can be further explored based on two pathways of union participation.
- c) Cross effect of transactional leadership on drive to bond and drive to comprehend and the other effect of transformational leadership on drive to acquire and drive to defend need to be explored to completely establish two separate pathways.

Conclusion

Two separate pathways for union participation exists one emerging from transactional leadership and the other emerging from transformational leadership. Transactional leadership through management of punishment and reward, activates the drive for acquire and drive for defend, which leads to attitude formation of union instrumentality. Union members in this path, participate in union based on its instrumental value. Transformational leadership through inspirational motivation, individualized consideration, intellectual stimulation and cha-

risma activates the drive for comprehend and drive for bond in the union members. This leads to pathway of affective union commitment resulting into the participation in union based on ideological, collective value. Both the styles – transactional and transformational – are important for union leadership with their effectiveness being moderated by the favorability of industrial relations climate. In chaos and cosmos, transformational leadership is effective and in moderately favorable industrial relations climate transactional leadership is effective. It is activation of drives to acquire, to defend, to comprehend and to bond that leads to attitude formation and union participation by union members. Union leaders need to play crucial role in this activation through transactional and transformational style to create the better union participation by rank and files.

Acknowledgements

We thank Prof. Santanu Sarkar, XLRI Jamshedpur for his valuable comments.

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Appendix I

Stewards Typology	Transactional	Transformational
Nicholson (1976)	Mediation, welfare, problem solving	Actualizing
Batstone et al.(1977)	Populists, Cowboy	Leaders, Nascent leaders
Marchington et. al.(1983)	Work group leader, populist	Leader
Reshef (1987)	Cooperative	Radical
Chang et. al. (2005)	Grievance handler, negotiator, contract enforcer,	Protector, Union builder, internal organizer, leader, political activist
Chinoy 1950	Ambitious	ideological