

Learning from Clerical Unions: Two Cases of Organizing Success

Richard W. Hurd
Cornell University

This paper summarizes two successful clerical organizing campaigns. The first case describes the District 65 campaign to gain representation rights and contract protection for the clerical employees of Columbia University. The discussion reviews the tactics employed to win a representation election, to maintain rank and file involvement during an extended legal battle, and to conduct a successful strike for a first contract. The second case describes a campaign by Teamsters Local 364 to achieve recognition and bargaining rights for public school secretaries in South Bend, Ind. Already members of an employee association, the secretaries sought to affiliate with the Teamsters in order to engage in collective bargaining. The discussion reviews how the local union and the rank and file organized the community to force the school board to grant bargaining rights. Based on the cases, lessons are drawn for other unions regarding external organizing, internal organizing, public relations, coalition building, and involving women members in local union activities.

If the union movement hopes to retain its vibrancy, it must successfully organize workers in the sectors of the economy which are growing. Employment in the clerical occupations is steadily increasing, yet this group remains largely non-union. Recent initiatives by several major unions among clerical workers provide evidence that this challenge is being confronted, and there is reason for some optimism based on their experiences to date.

Clerical workers are difficult to organize. Most of them are women, and they view unions with a healthy degree of skepticism. Many clericals see unions as bastions of the macho, blue-collar male. They tend to disdain the confrontive style of unions, and do not readily perceive any direct benefit from organizing. Furthermore, most clerical workers in effect hold a second job in the home with primary responsibility for childcare and housekeeping. This interferes with organizing by reducing *the* potential pool of organizing committee members, and by limiting the accessibility of workers outside the normal work hours¹.

These barriers to organizing are by no means insurmountable. Like other workers, clericals have complaints about pay, benefits, and working conditions. Many of them are particularly sensitive to the subservient position in which they are often placed by management, and are eager to gain respect and justice in the workplace. By keying in on the particular concerns of clerical workers, and developing new organizing techniques specifically geared to this audience, several unions have been able to overcome the pre-existing barriers to organizing.

To date, unions have been most successful in organizing two specific groups of clerical workers—state and local government employees and university clericals. Clericals employed by state and local governments are especially receptive to unionization in those instances where they already belong to

¹ For a more complete discussion of barriers to organizing clericals, see Richard W. Hurd and Adnenne McElwain, "Organizing Chemical Workers: Determinants of Success," *Industrial and Labor Relations Review*, 41 (April 1988): 361-363. In spite of these barriers, most research concludes that women workers are as likely as men to support unionization. See, for example, Paula EL Stephen and Bruce Kaufman, "Factors leading to a Decline in Union Win Rates: 1973-1981," 302-304, in Barbara D. Dennis (Ed.), *Proceedings of the Thirty-ninth Annual Meeting* (Madison, Wis.: Industrial Relations Research Association, 1986).

employee associations. Over time these associations have typically taken on activities similar to those pursued by public sector unions—involvement in pension plan administration, lobbying for budgetary increases to fund pay and benefit improvements, and even assisting members with complaints filed under civil service regulations. It is a logical next step to seek full collective bargaining rights via unionization. Many public sector clerical organizing campaigns are actually affiliation votes by members of an employee association.

Universities offer an inviting target to clerical organizers for three primary reasons. First, by tradition university campuses are open to the public, providing access to the workers who are being organized. Second, universities are geographically stable, virtually eliminating the potential that management will simply relocate in the face of a successful organizing campaign². Third, universities typically pay their clerical employees below the market wage relying on the prestige associated with university employment to attract qualified applicants. For these reasons unions have found university clerical employees to be more receptive to unions than other clerical workers³.

The cases described in this article are examples of successful organizing campaigns in units representing these two categories. They were selected from hundreds of clerical organizing campaigns described in interviews with organizers and rank and file activists representing nine national unions. These particular cases are representative and they are also inspirational. The problems confronted in the two campaigns were particularly difficult, the union responses were unusually creative, and the rank and file were especially committed. Nonetheless, the types of barriers the unions faced are typical of other campaigns, as are the organizing strategies which rely on substantial rank and file involvement. The two cases described below help highlight the key elements of a successful clerical organizing campaign.

The first case describes the five-year campaign waged by District 65 to gain representation rights and contract protection for the clerical employees of Columbia University. The discussion focuses on the tactics employed by District 65 to organize in the unit first to win a representation election, then to maintain rank and file involvement during an extended legal battle, and ultimately to conduct a successful strike for a first contract.

The second case describes a two-year campaign conducted by International Brotherhood of Teamsters Local 364 to achieve recognition and bargaining rights for secretaries employed by the South Bend, Ind., Community School Corporation. In this instance the secretaries had already organized themselves through an employee association and sought to affiliate with the Teamsters for the purpose of engaging in collective bargaining. The case describes how the local union and the rank and file organized the broader community to ultimately force the school board to grant bargaining rights to the secretaries.

These cases should be of special interest to labor educators in part because most of the key participants are women. In the *Labor Studies Journal* theme issue on "Turning the Tide: Women, Unions, and Labor Education," Naomi Baden suggested that "New organizing techniques and successful treatment of women's concerns . . . be documented and disseminated more widely among thousands of local unions who use labor education programs."⁴ It is in this spirit that these cases have been prepared.

² Because of improvements in communications technology, runaway shops are a viable option to management in many private-sector operations with a substantial clerical work force.

³ For more details on organizing among university clerical employees, see Richard W. Hurd and Adrienne McElwain, "Organizing Activity among University Clerical Workers" (mimeographed), presented at the Industrial Relations Research Association's Forty-first Annual Meeting, New York, December 1988; also see Richard W. Hurd and Gregory Woodhead, "The Unionization of Clerical Workers at Large U.S. Universities and Colleges," *Newsletter*, National Center for the Study of Collective Bargaining in Higher Education and the Professions. 15 (July-August 1987).

⁴ Naomi Baden, "Developing an Agenda: Expanding The Role of Women in Unions," *Labor Studies Journal*, 10 (Winter 1986): 247.

The cases should be especially useful in educational programs specifically geared to local unions with substantial white-collar membership because of the direct relevance of the strategies portrayed. They might also be used in programs for "traditional" union members (blue-collar males in manufacturing and construction), and thereby facilitate the integration of the women leaders of clerical unions into the broader labor movement. To quote Baden again, "Although stereotypes held by members and leaders will not disappear overnight, unions and labor educator can counter traditional views and prejudices by popularizing images of women as leaders in the union institution⁵."

It would be a mistake to view the cases too narrowly, as related only to the issue of women in unions. There are important lessons which should be useful to all trade unionists regarding external organizing, internal organizing, coalition building, and public relations. They support the notion voiced by Ruth Needleman in the "Feminizing Unions" issue of the *Labor Research Review*, that

Female involvement at every level of union activity and decision-making will strengthen that trend within organized labor that historically has advocated greater rank-and-file participation, greater internal democracy, [and] more collective and community-oriented practices. . . .⁶

The Columbia University Clerical Workers⁷

Background

In 1973, District 65⁸ made a conscious decision to organize university clerical workers. With the union's headquarters in New York City, it was natural that a primary initial target would be Columbia University. An organizing campaign at Columbia eventually resulted in defeat for District 65 in a 1976 NLRB election. The union was more successful among clericals at three smaller institutions affiliated with Columbia, winning elections at Barnard College in 1973, Teachers College in 1974, and Union Theological Seminary in 1979.

After the 1976 defeat, the organizing campaign at Columbia lay dormant until September 1979, when a group of 10 clericals began meeting with leaders from the locals at Barnard and Teachers Colleges. The members of this small organizing committee realized that they faced a formidable task. Columbia's 1,100 clerical employees are scattered across campus, working in 42 different buildings, often in offices with only two or three other clericals. As Maida Rosenstein recalls, "I remember feeling completely discouraged—I didn't know anybody outside of my department. How could we ever bring all of these people together and unionize them?"⁹

The difficulties faced by the Columbia organizing committee are similar to those present in other university clerical organizing campaigns. In addition to the physical dispersion of the workers, there is typically a high turnover rate because of the relatively low pay at most universities. Furthermore, many of the clericals take special pride in their jobs because of their close working relationships with faculty members. As explained by District 65 organizer (and former Columbia employee) Lee Fleming, "You have to explain to them it's not a professor that's causing the problems, it's the institution. It takes quite a bit of education."¹⁰₁₀

⁵ Baden, "Developing an Agenda."

⁶ Ruth Needleman, "Women Workers: A Force for Rebuilding Unionism," *Labor Research Review* 11 (Spring 1988): 2.

⁷ Based largely on personal interviews with Julie Kushner, District 65 vice president, New York City, May 1 and 2, 1986, and on a group interview with four leaders, of the Columbia local (Susan Calm, Barbara O'Farrell, Sally Otos and Maida Rosenstein), New York City, May 1, 1986.

⁸ At the time District 65 was an independent union, formerly known as the Distributive Workers. In 1981, District 65 merged with the United Automobile Workers.

⁹ Maida Rosenstein interview.

¹⁰ *Progressive*, 48 (May 1984): 19.

The Organizing Campaign

The organizing progressed slowly. After nearly a year only 200 of Columbia's 1,100 clerical workers had signed union authorization cards. At this point District 65 decided to assign a full-time organizer to the campaign. Julie Kushner, who had worked on a successful drive to unionize Boston University's clerical workers in 1979, held her first meeting with the small organizing committee in September 1980. Based on her experience at Boston, Kushner was convinced that one-to-one contact with every member of the unit would be necessary. Choosing from the most committed of those who had already signed cards, the organizing committee was expanded to 25. To the extent possible, the committee approximated the unit's racial and ethnic diversity, and included representatives from each of the major buildings on campus. The committee met at least weekly to evaluate progress and to map strategy.

Most of the organizing took place during lunch meetings between members of the organizing committee and individuals who had not yet joined. The benefits of unionization were explained and fears were answered as rationally and truthfully as possible. As the campaign progressed an extended committee of 125 was formed so that every member of the unit could be contacted individually. This grassroots organizing was the essence of the campaign.

General meetings were avoided because they were difficult to coordinate. After-work meetings are usually out of the question for clerical workers because of the household chores most working women still perform. At Columbia, general meetings at lunchtime also proved difficult because of the dispersion of the workers, staggered lunch breaks, and what one organizing committee member described as "the character of the place."¹¹ Rather than schedule a general meeting and have a meager turnout which could damage morale, the committee decided to use other methods to build support and communicate with the members.

The first step was to distribute a regular newsletter which reported on progress in the campaign and covered issues of importance to members of the unit: working conditions, pay, benefits, and personnel policies at Columbia; experiences of clerical unions on other campuses; and information on relevant District 65 activity. The September 1980 newsletter included a list of the 25 organizing committee members, plus an expanded list of 100 contacts whose offices were scattered across the campus.

The systematic one-to-one organizing supplemented by the newsletter was successful in attracting new members. Six months later in March 1981, District 65 filed for an NLRB election with cards signed by a majority of the unit. Rather than agree to a speedy election, the Columbia University administration initiated a series of legal maneuvers designed to elicit a favorable unit definition. These maneuvers secured a December 1981 order from the NLRB Regional Director which would have allowed middle management to vote in the representation election. At the urging of the organizing committee, District 65 decided to appeal.

The case was reopened in February 1982. Five months of hearings were followed by a series of delays, some caused by legal briefs and others by the NLRB's backlog of cases. Finally, in April 1983 the Regional Director's decision was reversed and an election was scheduled for May 4, 1983.

District 65 was prepared for the vote. The newsletter and one-to-one organizing had continued throughout the two-year delay. They were supplemented in the week before the election by a series of receptions held in different areas of the campus. Clerical workers were invited to drop in during their lunch break, and were given balloons with a union slogan to take back to their offices. "Vote Yes-District 65" balloons were everywhere— tied to chairs, doors, and even typewriters. Organizing committee members fondly refer to this period as "balloon days."

¹¹ Rosenstein interview

The election was close, with District 65 winning by 26 votes. However, final victory was elusive, as the administration continued its legal campaign, challenging 97 ballots and filing an objection which claimed that the NLRB did not hold a fair election. Utilizing incessant legal delays, Columbia was able to postpone dealing with the union for nearly two more years.

The administration's use of delaying tactics was a clear attempt to weaken a union which had won only a bare majority in the certification election. Instead of succumbing to the pressure, Kushner, other District 65 organizers, and ultimately the organizing committee used the delays to strengthen the local. The one-to-one organizing continued. With relatively high turnover, new workers needed to be organized. The organizing committee also continued to pursue those who had voted against the union, and kept in touch with supporters both through personal contact and the newsletter.

During this period, the local hit on a tactic which proved to be central to sustaining interest and support. Shortly after the union's 1983 election victory, Columbia unilaterally reduced the benefits of members of the unit by increasing the deductible for basic medical insurance and requiring a 50 percent co-payment of premiums for major medical coverage. The organizing committee decided to circulate a petition protesting the benefits cut and demanding that the administration negotiate the issue with the union. The petition was signed by 630 workers, which was approximately 70 more than had voted for the union. This success was a tremendous morale boost as union members began to realize that they really were a majority.

This success encouraged the organizing committee to use the tactic again. A few months later the local distributed a second petition, addressed to Sen. Patrick Moynihan, Gov. Mario Cuomo, Mayor Edward Koch., and other elected officials. Noting the perpetual legal delays and the university's unilateral reduction of benefits, the petition asked the elected officials to intervene and to encourage the NLRB to speed up the process and certify District 65 as the bargaining agent. More than 700 clericals signed in support of this request. These and subsequent petitions played a central role in the campaign to keep the Columbia clerical workers committed to the union. Systematically distributed by the extended 125-member committee, the petitions provided the local a vehicle to maintain direct contact with its supporters. The publicity which followed public release of the petitions helped the union sustain a high level of visibility, which contributed to its continued success in organizing new employees.

In spite of their popularity and general usefulness, the petitions failed in the ultimate goal of achieving recognition for the union. Early in 1984 some members of the organizing committee began to urge a more militant posture. They were convinced that Columbia would not respond to anything less than a legitimate strike threat. But the committee as a whole was not convinced that the general membership was ready for such a drastic step. Instead, a decision was reached to prepare for a huge meeting on May 4, 1984, the anniversary date of the election victory. The organizing committee and the extended committee systematically organized for the May 4 rally. Every member was contacted individually and encouraged to attend.

The rally was a big success, described by the organizing committee as "very large and very angry."¹² The willingness of the rank-and-file to attend a large meeting was viewed by the organizing committee as a clear sign of progress. Perhaps some form of direct action would succeed if it became necessary. Apparent victory on the legal front temporarily postponed any obvious need for increased militance—later in May 1984 an NLRB hearing officer upheld District 65's 1983 election win. The university response, of course, was to file an exception and the legal delays continued.

In the fall of 1984 events elsewhere became the focal point of attention for Columbia clerical workers. The 10-week strike staged by their counterparts at Yale helped change the attitudes of cautious organizing committee members and previously passive members of the rank and file. As recalled by local officer Sally Otos, "It laid to rest the idea that Ivy League clerical workers won't strike,

¹² Rosenstein interview.

and it lasted a long time so we could keep talking about it.¹³ To facilitate the discussions, the organizing committee copied articles about the strike and distributed them across campus.

In January 1985, at about the time the Yale local signed its first contract, the Columbia union decided to take a strike vote. The rank-and-file members were finally ready, and overwhelmingly endorsed a strike deadline of February 4, 1985. To avoid a strike, the university would have to agree to recognize the union and schedule negotiations. On January 30, Columbia caved in to the threat. The legal challenges were dropped, and the NLRB certified District 65 as bargaining agent on February 2, 1985.

Collective Bargaining and the Columbia Strike

Negotiations began on March 7, 1985. District 65 proposed a contract similar to the one already covering clerical workers at Barnard. The union noted that one-third of the members of the Columbia unit were paid wages below the starting rate for their Barnard counterparts. Furthermore, the medical insurance for Barnard workers was paid in full by the university, while the Columbia clericals were still saddled with a 50 percent co-payment for major medical, and a large deductible for basic insurance (\$250 per year for individuals, \$750 per year for families). In addition to pay and benefit parity with Barnard, District 65 proposed a strong affirmative action program. The union's minority members accounted for 49 percent of total employees, but represented 62 percent of those in the lower five grades compared to only 33 percent of those in the top three grades. This concentration of employment in the lower grades occurred in spite of longer average seniority for minority workers.¹⁴

Predictably, the administration stonewalled negotiations. As summarized by union negotiating committee member Barbara O'Farrell, "We got a 'no' to everything, and if it was going to cost a dollar, a double 'no'."¹⁵ In an attempt to get the university to move, the union distributed to its members an open letter protesting stalled contract talks. The letter was signed by more than 700 members and publicly released at an April 30, 1985, rally. Still the university refused to budge.

In 26 bargaining sessions spread over seven months, there was little progress on the key issues. In September the organizing committee called for a strike authorization vote. In a secret ballot vote, the membership was nearly unanimous in its support for a strike. An October 17 deadline was set and the union began strike preparation. There were three key aspects of strike preparation: organizing the members, coordinating support on campus with faculty and student sympathizers, and arranging for external support from District 65, the UAW, and the broader labor movement. Within the local, the organizing committee used its systematic communication network to plan for the strike. Each member of the unit was assigned picket duty at one of more than 40 sites, covering all campus entrances and major buildings. In most cases, members were assigned to locations nearest to their offices so they could see people they knew and try to persuade them to support the strike. Eight-five picket captains and area coordinators were selected. Training sessions were held for this group to discuss responsibilities. Each picket captain was encouraged to develop team spirit within his/her crew, and to plan enjoyable activities for the picket line. A monitoring system was developed so that the union could keep track of the status of every worker—picketing, at home, or scabbing.

The union was assisted by several members of the Columbia University community in its on-campus strike preparation. Most notably, Columbia undergraduate Michael Parris coordinated student support, and Columbia Professor Eric Foner coordinated faculty support. In advance of the strike

¹³ Otos interview. For a description of the organizing campaign at Yale, see Richard W. Hurd, "Bottom-up Organizing: HERE in New Haven and Boston," *labor Research Review*, 8 (Spring 1986): 5-20.

¹⁴ "The Columbia Local: Our History and the Issues," mimeographed. District 65, New York, October 1985.

¹⁵ *Solidarity*, November 1985, p. 8.

deadline more than 500 classes had been scheduled for off-campus sites. Arrangements were made with the campus ministries to use their building. Earl Hall, as a strike headquarters.

External support was coordinated primarily through District 65 headquarters. A week before the strike deadline the District 65 New York and New Jersey Councils held their regular meeting at Columbia, and pledged strike assistance to the local. Plans were drawn up for District 65 members in the New York metropolitan area to help staff picket lines. The District 65 General Council pledged financial support from its Fight Back Fund. The UAW agreed to provide strike benefits in the event of a lengthy walkout. Contact was established with the New York Central Labor Council in case its assistance was needed.

As the October 17 deadline approached, negotiating activity increased and both sides agreed to bring in a federal mediator. After work on October 16, the local held a general membership meeting to report on negotiations and to discuss strike preparations. Only 350 attended. Negotiations continued throughout the evening. The mediator, convinced that progress was being made, recommended that the union "stop the clock" and postpone the strike deadline so that bargaining could proceed. After an all-night debate, in a close vote, the organizing committee decided to recommend to the members that they accept the "stop the clock" proposal. The relatively light turnout at the general meeting on the previous afternoon had raised concerns that commitment to a strike was not sufficient for it to succeed.

When Columbia clericals arrived on campus for a scheduled pre-work union meeting, they were greeted by 1,000 District 65 members from the metropolitan area prepared to help on the picket lines. More than 700 members of the local reported to strike headquarters and shouted down the organizing committee's recommendation. As reported in the District 65 newspaper:

[T]he membership was in no mood to wait. The vote to strike was virtually unanimous. Says [organizer] Julie Kushner, "It was the proudest moment of my life." For the last five years she has led the Columbia campaign through its ups and downs. She has seen the Columbia workers gradually shed their reticence, ultimately to become the militant membership which exercised its democratic rights that day¹⁶

The extensive pre-strike preparation paid off. The picket captains coordinated their teams' activities, and each picket line developed a personality of its own. Portable tape players were everywhere. On one picket line disco music provided the background; on another, a member taught ballroom dancing; and on another, a member led her group in "aerobic strike dancing." A more confrontive picket line physically blocked nonunion truck drivers from making deliveries. Meanwhile at strike headquarters, phone banks were staffed with strikers who called scabs at work, trying to persuade them to walk out. Also at strike headquarters, day care was provided for children of those on the picket lines.

At the end of the first day the members returned to strike headquarters (now called the "oasis") to turn in their picket signs. The oasis was conveniently located across from the university's administration building. That morning while the union was voting to strike, Columbia President Michael Sovern had announced to the faculty senate that there would not be a strike. As the strikers gathered that evening someone started a chant which was contagious: "Hey, Mike, we *are* on strike!" Local officer Sally Otos recalls, "We are delirious. It could have gone on all night."¹⁷

In addition to the effectiveness of the internal organization so clearly demonstrated by the solidarity and enthusiasm of the members, other aspects of strike preparation paid off as well. Faculty members held classes off-campus, and joined students and strikers on the picket lines. Normal activity

¹⁶ *Distributive Worker*, December 1985, p. 3.

¹⁷ Sally Otos interview.

on campus was brought to a virtual halt. The Teamsters instructed members to cease all Columbia deliveries and garbage pickup. CWA members refused to cross picket lines to repair phones. And New York Central Labor Council President Harry Van Arsdale announced that a major labor rally in support of the strikers would be held at Columbia on Tuesday, October 22.

After only five days (including the weekend) the university succumbed. On October 21, 1985, Columbia clerical workers voted to accept a contract which met all of their major demands. Starting wages were increased to a level comparable to that of Barnard employees. Each worker received a pay increase of at least 6 percent retroactive to July 1, 1985, with an average effective increase of 8.5 percent. Health benefits were also improved significantly. Perhaps most important, a strong affirmative action program was established with union representation on a new Affirmative Action Committee.¹⁸

The success at Columbia transcended the narrow gains spelled out in the contract. In the course of the lengthy campaign and systematic organizing, attitudes were changed and a strong union was constructed. An open letter from Ivan Farleas to his brothers and sisters who participated in the strike captures the essence of this broader victory:

I did not realize that we, who sit so meekly at our desks and do as we're told most of the time, can stand up and roar when the spirit moves us. And I saw that spirit, our spirit, manifest itself that electrifying Thursday morning when someone in the back row stood up and said: "Hell, no, I'm not going back to work!" I guess we did not know we had it in us. But now, we do know.¹⁹

The South Bend Public School Secretaries²⁰

Background

In the early 1970s, clerical employees of the South Bend Community School Corporation (SBCSC) established a chapter of the National Association of Educational Secretaries. Although primarily a social and professional organization sponsoring skill improvement programs for its members, the association also assumed some union-like duties. The chapter's Liaison Committee met periodically with management to discuss wages, benefits, and working conditions. The scope of these discussions was limited, however, because the key fringe benefits were in effect determined by the SBCSC's contract with the National Education Association (NEA) representing the teachers, while other working conditions were based on the SBCSC's contract with the American Federation of State, County, and Municipal Employees (AFSCME) representing the custodial staff. Furthermore, because there was no formal collective bargaining agreement, the association had little leverage in dealing with management. In fact, management would not meet with the Liaison Committee until contracts were finalized with the formal bargaining units.

The clerical workers got the message that they were not very important. Although their pay and benefits were adequate, that was because they were unofficially tied to the contracts with the NEA and AFSCME. Apparently in the interest of budget restraint, the number of clericals declined from 140 in 1979 to 115 in 1983, with no corresponding reduction in the total workload.

¹⁸ *Distributive Worker*, December 1985, pp. 8, 10.

¹⁹ *Distributive Worker*, December 1985, pp. 8, 10.

²⁰ Based largely on a personal interview with Vicki Saporata, International Brotherhood of Teamsters organizing director, Washington, D.C., January 28, 1986, and on the following telephone interviews: Bob Schulz, IBT Local 364 business agent, March 31, 1986; Fran Boyce, member of the South Bend clerical unit, May 19, 1986; Gayle Farrell, member of the South Bend clerical unit, May 19, 1986; Keith Knauss, Indiana University-South Bend labor studies program, April 9, 1986; Jerry Paar, Indiana University-South Bend labor studies program, May 19, 1986; Mary Craypo, community supporter, April 9, 1986; and Jeanne Troutman, community supporter, May 19, 1986.

The final straw came in August 1983, when the SBCSC decided to save money by not filling six clerical vacancies just as the new school year started. In order to cover for the vacant positions, management transferred several long-term employees and doubled the workload of others. Although most of the clericals were not directly involved, the uncertainty created by the unilateral reassignments created a hostile environment. The secretaries' attitude was explained by Darden School secretary, Gayle Farrell:

Because of the way we've been treated in the past, we have no job security. They just give us what they want and we take it. We have no say.²¹

The secretaries decided to act because of their frustration, and through their association began to seek a union to assist them.

During the winter of 1983-84, the South Bend chapter of the National Association of Educational Secretaries met with representatives of several unions to discuss possible affiliation. In March 1984, the members voted to have Local 364 of the International Brotherhood of Teamsters represent them in their attempt to gain collective bargaining rights. The secretaries selected the Teamsters because they were impressed with the competence and availability of the local's professional staff, and because Local 364 already had a strong presence in South Bend, including units of city and county employees which included clerical workers Local 364 business agent Bob Schulz went to work immediately at what turned out to be a 20-month campaign for recognition.

Schulz started with a six-member organizing committee, and held weekly evening meetings throughout the campaign. The committee gradually expanded to an average of 25 active participants. The meetings were essentially strategy sessions, although there were some educational sessions on topics such as union-busting tactics and collective bargaining. Because many of the secretaries had already taken courses through the Indiana University-South Bend labor studies program, there was less need for educational content than in other clerical organizing campaigns.

In the summer of 1984, Local 364 conducted a card campaign and 90 of the 115 members of the unit signed. There was a small but strong willed minority who opposed the Teamsters, but who signed cards in order to have an election. This group preferred formal collective bargaining through the secretaries association and did not actively participate in the Local 364 campaign described here. Although a number of the stronger supporters of the Teamsters resigned from the association because of this difference of opinion, the division was not bitter since the overwhelming sentiment favored collective bargaining.

The obvious desire among the secretaries for union representation did not convince the SBCSC board. At an August 20, 1984, meeting the board voted *not* to allow an election. School Superintendent James Scammon opposed the election because he was afraid that unionization might eventually result in a strike. Indiana's public sector bargaining statutes affirm the right of teachers to be represented by unions, but also make strikes illegal. A 1975 law which would have extended these rights and restrictions to other school system employees was ruled unconstitutional by state courts because of a technical flaw. Thus Scammon's opposition was not without foundation—there are no specific legal restrictions on the right to strike for non-teaching school system employees.

From the perspective of the secretaries, of course, this legal limbo was extremely frustrating. While public officials could use the lack of strike restrictions to rationalize their opposition to a union, the secretaries had no obvious legal recourse. Without a collective bargaining law there is no formal system in place which assured non-teaching school employees the right to select a collective bargaining agent. When the school board refused to consent to a representation election, the secretaries and Local

²¹ Indianapolis Star, February 3, 1985.

364 responded with a creative multi-faceted campaign designed to force the board to reverse its decision.

The Union Campaign

On the first full day of school in September 1984, the secretaries demonstrated their resolve when 40 called in sick. The job action helped build solidarity within the most activist group, and served to put the school board on notice that the secretaries did not intend to let the matter die without a fight. A highly visible, coalition-based campaign ensued, with the weekly organizing committee sessions used to map strategy.

The organizing committee decided to take its case to the citizens of South Bend. The request for support was based on two related arguments. The first was that in order to achieve fair treatment, the clerical workers needed union representation. This theme was supported by an appeal to women's rights, as the organizing committee members gave an account of their inequitable treatment regarding the determination of wages, job assignments and workloads, and described the general lack of respect displayed by management. The second was that as members of a free society, the secretaries should have the right to choose whether or not to be represented by a union. This proposition was defended by explaining that Local 364's request for recognition as bargaining agent was predicated on the outcome of a democratic election in which all secretaries in the school system would have the right to vote.

Local 364 leaders and organizing committee members began the process of cultivating support from other local unions, women's organizations, political groups, and the university communities at Notre Dame and Indiana University-South Bend. In some cases the leaders of Local 364 used their personal contacts in the labor and political community to gain assistance. In other cases members of the clerical unit made presentations at meetings of potentially sympathetic organizations. As the campaign gained momentum, progressive community leaders arranged for resolutions for support from organizations with which they were affiliated.

The school board held bi-weekly meetings, which by tradition began with an open discussion, during which members of the community were allowed to voice their concerns and opinions. The school secretaries and their supporters attended these meetings regularly. At first, officials of Local 364 and the secretaries themselves exhorted the school board to change its position and to allow a representation election. As the community-based campaign progressed, representatives of other organizations used this forum to publicly announce their endorsement of a representation election.

At a typical school board meeting on November 11, 1984, the secretaries were buoyed by statements from representatives of local chapters of the National Organization for Women, the Women's International League for Peace and Freedom, and the Indiana Citizens Action Coalition. At a particularly spirited school board meeting on December 3, 1984, supportive statements from a dozen speakers were followed by a round of "Solidarity Forever," as the secretaries and their allies left the meeting. Among the groups which eventually chose to endorse a representation election were the YWCA, the League of Women Voters, the North Central Indiana Council of the AFL-CIO, locals of many unions including the National Education Association and United Automobile Workers, the Labor Students Association at Indiana University—South Bend, the South Bend Religious Community Board of Directors, and the Rainbow Coalition. Community support grew steadily, and was so widespread by May 1985 that the South Bend City Council unanimously endorsed a representation election.

In addition to soliciting assistance from community groups, representatives of the organizing committee and Local 364 appeared on radio talk shows, and wrote "op ed" pieces and a steady stream of letters to the editor. The secretaries also staged media events to assure that the issue did not die. One event which attracted attention took place in January 1985, when 30 members of the unit braved wind chill temperatures of 40 below zero to picket the offices of accountant William Wilson, a school board member and outspoken opponent of the clerical union. On another occasion in May 1985, the

secretaries wore paper bags over their heads as they picketed the offices of lawyer Robert Parker, another opponent on the school board. The paper bags symbolized the board's blindness to employee complaints.

The linch pin of Local 364's community-based strategy was a complaint filed with the Indiana office of the federal Equal Employment Opportunity Commission. The complaint, filed by 53 members of the clerical unit on October 19, 1984, charged the SBCSC with sex discrimination in its decision to deny the secretaries' request for a union representation election. As noted above, Indiana law assures teachers the right to unionize, but other school system employees have the opportunity to unionize only at the discretion of the employer. In South Bend, two groups of non-teaching school employees had been granted this opportunity by the school board—the school bus drivers and the custodians. Both of these units were comprised almost totally of men. On the other hand, almost all of the secretaries were women. The 53 clerical workers charged that the school board's denial of their request to vote on unionization was, therefore, a discriminatory act.

The EEOC complaint, referred to the South Bend Human Rights Commission for investigation, became the rallying point for the campaign to build community support. This focus on the discriminatory aspect of the board's action was directly responsible for the involvement of several prominent women's organizations, most notably the National Organization for Women and the League of Women Voters. Jeanne Troutman, a representative of the Women's International League for Peace and Freedom, described the campaign as "*The hot feminist issue*" in South Bend.²²

Management Response and Resolution of the Conflict

The response to the Local 364 organizing campaign by the SBCSC is best described as "positive labor relations." Although holding firm to the decision to deny the secretaries' request for a union representation election, the school board and school superintendent adopted a conciliatory attitude towards the secretaries themselves. Superintendent Scamman publicly admitted, "We really slipped with the secretaries, and the feeling that they got the crumbs that were left after all the others were finished is not without basis."²³ In an apparent attempt to rectify the situation the school board approved a 10 percent pay increase for the secretaries effective January 1985.

In addition to the pay raise, the SBCSC also announced plans to improve employment policies affecting the secretaries. In March 1985 the school board hired a consulting firm, Monogram Organizational Envelopment Co. to interview all clerical employees and their supervisors. The goal of the interviews, as described by school board members (and Local 364 antagonist) William Wilson, was to "affirm the major issues that people truly need to have resolved."²⁴

Monogram submitted its report to the school board in May 1985. Virtually every aspect of the personnel system was criticized, including workloads, overtime policies, job descriptions, operational policies, job transfer policies, job posting procedures, and the pay system. Monogram confirmed widespread support for unionization, and noted that, "Some believe [union representation] is the only way the [school] corporation will respond to them in a professional way."²⁵

Publicity surrounding the Monogram report added to the woes of the school board and strengthened the position of Local 364. In April 1985 the South Bend Human Rights Commission had issued a probable cause ruling which supported the EEOC sex discrimination complaint filed by the clerical workers six months earlier. When the school board decided to ignore the EEOC ruling, Local 364 began to prepare for a legal battle.

²² Jeanne Troutman interview.

²³ Indianapolis Star, February 3, 1985. p. 18.

²⁴ South Bend Tribune, March 26, 1985, p. 31.

²⁵ South Bend Tribune, May 2, 1985.

Meanwhile, beleaguered school superintendent Scammon had resigned his position in late March to take a job in Colorado. His replacement, Robert Fallon, was hired after both the South Bend Human Rights Commission and Monogram reports had been received. With clear evidence that the secretaries were committed to unionization, and faced with a potential legal battle before the EEOC, Fallon chose not to oppose a certification election. The school board subsequently concurred, and in August 1985 voted 4 to 3 to allow a union representation election.

Superintendent Fallon's willingness to accept an election in no way indicated a desire on his part that the clerical workers unionize. In the two months preceding the vote, Fallon held five general meetings with the secretaries in an attempt to dissuade them from unionization. His attempts proved fruitless, and Local 364 scored a resounding victory in November 1985, defeating the National Association of Educational Secretaries by a vote of 77-21. The long ordeal finally resulted in union protection for the secretaries when a contract was signed on April 21, 1986.

Lessons from Columbia and South Bend

The Columbia and South Bend cases demonstrate that clerical workers can be organized successfully even in the face of stiff and persistent management opposition. A number of the characteristics of these specific campaigns are consistent with those present in other clerical organizing efforts and they deserve some amplification.²⁶

In order to break down the union stereotype and educate workers about their rights and the potential benefits of unionization, most clerical organizers encourage extensive rank-and-file involvement in organizing campaigns. The large extended organizing committee at Columbia is typical, as are the one-to-one lunch meetings which were used there. Even after majority support is assured, most clerical unions encourage extensive membership participation. In South Bend, the members were responsible for organizing community support for their campaign to win recognition. At Columbia, organizing continued beyond the election as members conducted petition drives, contacted new employees, and participated in strike preparation.

Although inspired in part by the necessity of integrating education into the organizing process, an outgrowth of this organizing style is broad based rank-and-file involvement in the local even after contract protection is achieved. Local unions which are burdened with low levels of member involvement could benefit greatly from adopting a similar style for their internal organizing efforts. Ruth Needleman's observations regarding women unionists in leadership positions apply here, although they should be expanded to include union leaders who are men and are willing to learn from the clerical experience: "By practicing a more open, less competitive, and more collective leadership style, women may be able to improve the internal life of a union, encourage participation and reverse the trend toward membership apathy."²⁷

Especially in lengthy clerical campaigns, many of the tactics used are designed to create a positive image for the local union. By emphasizing issues like justice and women's rights, these unions can often attract sympathetic press coverage and community support. In South Bend the union actively cultivated this type of image through the widely publicized legal challenge filed with the Equal Employment Opportunity Commission, and kept the campaign in the limelight by staging creative media events. At Columbia, District 65 used petitions, rallies, and even balloons to focus public attention on their organizing and bargaining efforts. All unions would stand to benefit from emulating the type of coalition building and effective public relations practiced in South Bend and at Columbia.

²⁶ For a more general discussion of these issues, see Hurd and McElwain, "Organizing Clerical Workers," pp. 360-373.

²⁷ Ruth Needleman, "A World in Transition: Women and Economic Change," *Labor Studies Journal* 10 (Winter 1986): 227-228.

Another lesson from these cases is that management opposes attempts to organize clerical workers as vigorously as it resists organizing among other workers. The most common approach is to utilize legal strategies to frustrate the organizing committee and the union involved. At Columbia the administration filed a seemingly endless stream of legal challenges, appeals, and briefs in its campaign to avoid recognizing the union. In South Bend the school board and superintendent based their opposition to a representation election on the legal loophole which omitted Indiana public school employees from public sector bargaining law.

A common aspect of management opposition to clerical unions is positive labor relations, exemplified by the South Bend case where pay raises and employee surveys were used to demonstrate management's concern for the complaints being voiced by the secretaries. Occasionally more hard line tactics are employed, such as Columbia's unilateral decision to reduce medical benefits following District 65's election victory. However, management seldom relies on the more blatantly illegal steps often taken to thwart blue-collar organizing, such as firing union activists. Clerical organizers believe that these more drastic measures are omitted because management has a hard time believing that the secretarial staff really wants a union. As summarized by SEIU District 925 president Karen Nussbaum, "There is always a union buster, but management tends to underestimate women clerical employees."²⁸

Quite aside from management's delay tactics, clerical organizing is often a slow process. At Columbia, District 65 was active on campus starting in 1973, with the campaign described here taking 18 months (September 1979 to March 1981) before the union even filed for an election. In South Bend, a majority of the secretaries supported unionization at the time they approached Local 364, but this followed a decade of low-key involvement in a secretaries association which laid the foundation for union affiliation. In general, clerical workers prefer to deal with managers in a non-confrontive way because they work so closely with them and understandably want to avoid contributing to an uncomfortable work environment. This reluctance, combined with skepticism about unions, makes organizing a painfully slow process, even where legitimate problems with pay and working conditions are recognized.

Clerical workers tend to be more receptive to unions if there are other unionized workers nearby. In South Bend all other non-managerial school employees were represented by unions. At Columbia the clerical employees of three affiliated institutions (all in the same neighborhood) were already unionized. Furthermore, Teamsters Local 364 benefitted from an excellent reputation in South Bend, and District 65 has long been one of the most visible and progressive unions in New York City. In these cases the unions involved were able to overcome clerical skepticism about unions in part because the workers were already familiar with unions, and additionally because of the good local reputations of the unions involved. On a related point, the external support provided by organized labor in both cases offers a model which should be replicated both to bolster clerical organizing efforts and to attract the involvement of rank-and-file clerical union members in the broader labor movement.

Perhaps the most important message from these cases is that perseverance and creativity *can* overcome clerical workers' reticence towards unions, and their associated aversion to direct conflict. The skepticism clericals express is healthy because it is sincere. Once they are convinced to join a union, clerical workers typically stick by the decision. Over time, commitment evolves into militance. In South Bend the workers learned from their experiences in the secretaries association, and decided among themselves to seek unionization. When the school board refused their request for a representation election, they demonstrated their frustration and drew attention to their cause with a successful "sick out." At Columbia, years of building a union finally culminated in a successful strike for a first contract.

²⁸ Karen Nussbaum, personal interview, Whitefield, N.H. October 3, 1986.

As summarized by Karen Nussbaum, "Once clericals change their minds they are committed because it has been such a painful process to decide to unionize."²⁹

Because clericals will bring such a strong commitment, and because they need the organizational support unions can offer, local unions in all industries should reach out and organize the clerical employees in their own workplaces. In order to accomplish this task, local union officials must recognize both the legitimacy of the reservations expressed by clericals regarding unions, and the logistical problems women face as mothers and wives with responsibilities in the home.

The participation of clericals and other women workers in unions can be encouraged by providing day-care or baby-sitting during union meetings, or by scheduling meetings during lunch. As Ruth Needleman explains, ".....accommodations need to be made to facilitate women's involvement—adjustments in meeting and work schedules, greater emphasis on training, and a campaign of re-education to combat gender stereotypes and discriminatory practices at all levels of the union."³⁰ Perhaps most important, local unions need to demonstrate their resolve by encouraging clericals and other women to run for office and by otherwise integrating them into the leadership of the union.

The tenacity demonstrated by the clerical workers in South Bend and at Columbia is extremely encouraging. These cases indicate that successful organizing of clerical workers has the potential to contribute more to unions than additions to the membership roles. The vitality of the labor movement should benefit as well, because once organized, clerical workers bring with them a commitment and involvement which can help revitalize the spirit of unionism in the U.S.

²⁹ Nussbaum interview.

³⁰ Needleman. "Women Workers," p. 13.