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ABSTRACT

This paper presents information useful to educational leaders considering a labor-management cooperation (LMC) process. LMC is a mechanism for changing attitudes and building an atmosphere of trust between two traditionally adversarial groups. The first section outlines categories and provides examples of LMC cooperative efforts, highlighting the debate about the viability of the process. The second section applies the LMC process to school systems, presenting issues that educators must address and goals for joint cooperation activities. Case studies of LMC as implemented in two school districts are described in section 3. In one district, administrators provided only lip service to the concept of participation and missed an opportunity to bring about much-needed changes. The fourth section stresses the importance of establishing LMC processes in schools, which have the potential to develop a solid foundation based on mutual trust, commitment, and participation. One table is included. (LMI)

Labor-Management Cooperation in Schools

An Idea Whose Time Has Come

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LABOR-MANAGEMENT COOPERATION IN SCHOOLS: AN IDEA WHOSE TIME HAS COME

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LABOR-MANAGEMENT COOPERATION IN SCHOOLS: AN IDEA WHOSE TIME HAS COME

Labor-Management Cooperation (LMC). Some might jokingly call this phrase an oxymoron. But, a quick review of the industrial relations literature--where labor-management cooperation originates--yields more positive definitions of this seemingly contradictory phrase.

Researchers and practitioners define labor-management cooperation as a mechanism for changing attitudes and building an atmosphere of trust and confidence between two groups that traditionally assume adversarial postures (Schuster, 1984a). The labor-management cooperation process enables both groups to mutually agree upon goals and engage in activities that are responsive to their separate and collective needs and interests (Batt & Weinberg, 1978; Kochan, Katz, & Mower, 1984). It involves line workers and management staffs sitting down around the same table on a regular basis and solving problems of mutual concern not usually found in the collective bargaining process.

Definitions of labor-management cooperation are based on the understanding that the collective bargaining process is the formal structure for union-management decisionmaking (Batt & Weinberg, 1978; Kochan & Dyer, 1976; Schuster, 1984a; Siegel & Weinberg, 1982). However, many unions and companies in the private and public sector are participating in collaborative initiatives that extend collective bargaining beyond its traditional limits (Hammer & Stern, 1986; Kochan, et al., 1984; Kuper, 1977; Rosow, 1986; Schuster, 1984a; Siegel & Weinberg, 1982; U.S. Department of Labor, 1984). These groups form labor-management committees that meet regularly to improve attitudes between workers and management. In addition, they strive to increase contact and communication on positive problem solving and achievement-oriented activities, improve work behaviors, and increase productivity and quality improvement. These committees are designed to increase both employer and employee participation and positively impact organizational goals and objectives.

The emergence of cooperation efforts during the last decade can be attributed, in part, to the enactment of the Labor-Management Cooperation Act (LMCA) of 1978. The LMCA is designed to encourage efforts that:

- improve communication between representatives of labor and management;
- provide workers and employers with opportunities to study and explore innovative joint approaches to achieving organizational effectiveness;
- assist workers and employers in solving problems of mutual concern not susceptible to resolution within the collective bargaining process;
- study and explore ways of eliminating potential problems that inhibit development of the plant, area, or industry;

- enhance the involvement of workers in making decisions that affect their working lives; and

- expand and improve working relationships between workers and managers. (Schuster, 1984a, p. 6)

In recent years, school systems have become involved in labor-management cooperation efforts. Their programs, like those of their predecessors, are built upon the foundation of the collective bargaining agreement but they extend that process "into a host of professional and educational areas" (Fondy, 1987). These collaborations have many names, including: The Labor-Management Study Committee (Wichita Public Schools; 1987); Theory Z. Bargaining (Pheasant, 1985); The Teacher Professionalism Project (Fondy, 1987); The School Improvement Process (McPike, 1987); School Effectiveness Training (NJEA, 1982); The Labor-Management Cooperation Program (The Public Schools of Jersey City, 1984); and Participative Management (Moeser & Golen, 1987). The recurring theme that serves as a common denominator for all of these programs is their expressed purpose: to improve relations between employees and management and to focus on issues that will improve the teaching-learning process.

The authors of this paper believe that labor-management cooperation programs can help to create trust, commitment, and participation among teachers and administrators in schools. By joining forces, both parties can learn to appreciate each other's predicaments and better understand the potential barriers or constraints to school improvement (Miller, Smey-Richman, & Woods-Houston, 1987). Through a partnership, both groups create more balanced decisionmaking and help build a solid working relationship that is focused on school excellence.

Our purpose for writing this paper, then, is to present information, issues, and analyses that will be useful to educational leaders considering a labor-management cooperation process. We are very clear about our intentions. We believe the time is ripe for applying collaborative approaches to educational problem solving and for creating a climate of cooperation among the key parties involved.

With that thinking in mind, we have divided this paper into four sections. The first section provides categories and examples of labor-management cooperation efforts and reinforces the realization that joint labor-management partnerships are "nothing new under the sun" (Rosow, 1986, p. 3). This section is supplemented with highlights of the current debate concerning the viability of the labor-management cooperation process. The second section applies the labor-management cooperation process to school systems. Highlighted here are issues educators must address and goals for joint cooperation initiatives. This discussion is continued in the third section where two case studies of labor-management cooperation are provided. The fourth and final section of the paper stresses the importance of establishing labor-management cooperation processes in schools. Such collaborations can build a solid foundation, based on mutual trust, commitment, and participation that enables other significant organizational developments to take hold.

An Overview of Categories and Examples of Labor-Management Cooperation Efforts

Labor-management cooperation has a long history in the United States. In the 1920s, "after a bitter and unsuccessful strike of railway shopmen" (Siegel & Weinberg, 1982, p. 66), the Baltimore and Ohio Railroad and the machinists established "joint committees to increase efficiency, reduce waste, improve working conditions, and expand business" (Batt & Weinberg, 1978, p. 97). This initiative is cited in much of the literature as one of the first significant labor-management cooperation activities (Batt & Weinberg, 1978). However, the largest numbers of labor-management cooperation committees emerged during World War II, when President Roosevelt solicited cooperation from labor and management to mobilize the nation's productive resources (Siegel & Weinberg, 1982). Since that time many unions and companies have engaged in collaborations to improve relations, productivity, and the quality of work life.

As the numbers and types of labor-management cooperation approaches have blossomed, several schema have emerged for classifying these collaborations. At the federal and industrial levels, for example, Schuster (1984a) categorizes labor-management cooperation efforts into macro, intermediate, and plant levels. At the macro level, he includes presidential labor-management committees that make recommendations on economic industrial relations and manpower issues, labor-management policy committees, and companywide committees that develop responses to technological change. At the intermediate level, he lists areawide labor-management committees that bring the community's union leaders and chief operating managers together to increase communication and understanding between labor and management. At the plant level, he includes safety committees, in-plant labor-management committees and programs to improve union-management relations, productivity committees, gainsharing plans, quality circles, and quality of work life programs.

Examples of cooperative approaches that fit within these three categories are abundant in the literature (Rosow, 1986; Schuster, 1984a; Siegel & Weinberg, 1982; U.S. Department of Labor, 1984). Some more notable collaborations are included in Table 1. These programs have emerged at different times throughout the last 70 years and, in many cases, there are distinct differences in their structural make up. However, they share a common purpose--"to generate greater worker interest, involvement, and effort toward achieving important organizational goals" (Schuster, 1984b, p. 146).

Most literature on labor-management cooperation suggests that environmental conditions and changing circumstances have for many years significantly influenced both union and management perspectives on collaboration (Dialogue, 1984; Kochan, Katz, & Mower, 1984; Rosow, 1986; Schuster, 1984a; Schuster, 1984b; Siegel & Weinberg, 1982). Factors such as foreign competition; inflation and rising labor costs; unemployment; low productivity rates; and a change in the values, attitudes, and work behavior of much of the labor force have resulted in a considerable amount of pressure being placed on both labor and management to abandon their adversarial positions and engage in meaningful collaboration.

Table 1: Examples of Macro, Intermediate, and Plant-Level Collaborations

Macro-Level Collaborations: Presidential, Industrial, and Companywide Committees

- The National War Labor Board, the Advisory Committee on Labor-Management Policy, the National Commission on Productivity, the Pay Board, the President's Labor-Management Advisory Committee, the Pay Advisory Committee, and the National Productivity Advisory Committee -- established originally in 1918 by President Wilson and continued during the Roosevelt, Kennedy, Johnson, Nixon, Ford, Carter, and Reagan administrations to address macro-level labor-management cooperation issues.

- The Council on Industrial Relations for the Electrical Contracting Industry -- established in 1921 to resolve disputes between the National Electrical Contractors Association and the International Brotherhood of Electrical Workers.

- The Joint Labor-Management Committee of the Retail Food Industry -- organized in 1974 with union members and food chain executives to address major problems that affect the retail food industry as a whole.

- The Railroad Labor-Management Committee -- functioned between 1968 and 1977 for presidents of the railroads, the industry association, and railroad unions to discuss safety, training, and legislative issues.

- Minneapolis Star and Tribune Company -- established in 1972 a joint guild-management committee that meets during company time to discuss working condition issues.

- Mead Corporation -- established in 1976 a problem action committee of management and union representatives to discuss and resolve problems within the paper mill company.

Intermediate-Level Collaborations: Area Labor-Management Committees

- The Toledo (OH) and Louisville (KY) Labor-Management Cooperation Committees -- established in 1945 and 1946, respectively, to cultivate a climate of industrial peace.

- The Jamestown (NY) Labor-Management Committee -- established in 1972 and now including representatives of leading manufacturing firms, a hospital, a school system, and local unions to address issues related to improved labor relations, human resource development, industrial development, and productivity gains.

- The Evansville (IL) Area Labor-Management Committee -- established in 1975 by representatives from local unions, industry, and the public sector to serve as a forum for open communication and to promote cooperation.

- The Buffalo-Erie County (NY) Labor-Management Committee -- established in 1976 with nine management and ten labor representatives to put an end to labor-management strife and contribute to economic revitalization of the area.

- The Philadelphia (PA) Area Labor-Management Committee -- established in 1980 by representatives of almost every industry and trade association in the Philadelphia area to encourage a positive labor-management climate throughout the Delaware Valley.

Plant-Level Collaborations: In-Plant Labor-Management Committees

- The Communication Workers of America and the American Telephone and Telegraph Company -- established a joint quality of work life process in 1980 to increase employee participation on the job.

- The United Auto Workers and General Motors, Ford, and Chrysler corporations -- established quality of work life national committees in 1973 to change the way labor and management relate to each other and promote employee involvement in the decision-making process.

- The United Steel Workers of America and the Bethlehem Steel Corporation -- established an appendix to the 1980 collective bargaining agreement that became the framework for labor-management participation teams selected jointly by both parties.

- The International Brotherhood of Teamsters Local 1145 and Honeywell, Inc. -- agreed in 1980 to work on a joint participation process to reduce employee dissatisfaction and poor quality and to meet the challenge of changing and more competitive product markets.

Although many labor-management cooperation efforts emerged within the last decade to collectively address the economic and environmental factors, some programs have generated criticisms that reflect fear and suspicion of their initiators' intentions. Specifically, among those who are opposed to labor-management cooperation there are such beliefs as:

- These processes may be just a short-term ploy by employers to acquire greater work effort from workers without giving them real power to influence decision making within the organization.
- Workers will usurp the power and authority of management.
- Union leaders will become too closely identified with management and will become co-opted.
- These programs are an attempt to undercut unions and undermine the basic tenets of the collective bargaining agreements.

Supporters of labor-management cooperation believe that these concerns can be alleviated if solid relationships are established between labor and management representatives. They identify reasons such as the following for their support of the collaborative process:

- Worker participation in the decision-making process uses an untapped natural resource of ingenuity and enthusiasm.
- Labor-management cooperation can lead to increased improvement in productivity and increased job satisfaction.
- Labor-management relations can be improved through joint cooperation programs.
- Cooperative interventions can lead to better understanding of labor-management issues and serve as a foundation for subsequent organizational development efforts.

In both the private and public sectors, in spite of the concerns mentioned previously, support for cooperative approaches continues to grow. As a result, hundreds of labor-management cooperation programs are in existence today. These joint collaborations are undertaken as a means of addressing labor and management issues, and, given their benefits in both the public and private sectors, it is believed that they may be particularly useful to public school systems as well (Dialogue, 1984).

Applying the Labor-Management Cooperation Process to Schools

Many of the lessons learned about labor-management cooperation in the private and public sectors can be applied to education. By understanding the motivations for labor-management cooperation, the strengths and limitations of the process, and the basic assumptions about collaboration, we can develop labor-management cooperation processes that meet the needs and interests of our school and district personnel.

In public school systems, many stimuli serve as motivators for labor-management cooperation. Issues like labor strife, financial shortages, negative public images, low teacher morale, and poor student performance continue to thrive and, if left alone, will bring the system to its knees. If both labor and management are genuinely interested in the survival of public education, they can engage in meaningful collaboration and reap the benefits that the process can yield.

Educators considering a labor-management cooperation initiative should be knowledgeable about the benefits of cooperation, and should have a thorough understanding of the limitations of the process. In other words, they should know what labor-management cooperation is and what it is not before seeking to determine its usefulness.

Consultants who assist districts with labor-management cooperation programs are quick to make the distinctions, as this excerpt from a handout on labor-management cooperation suggests. It states that labor-management cooperation:

- is a process not a program
- is cooperation not conflict
- is problem solving not collective bargaining
- is not a panacea
- is not a quick fix
- is not always appropriate (Woods-Houston, 1987, p. 1).

In essence, then, labor-management cooperation focuses on changing attitudes and altering behaviors. It cannot function effectively in an adversarial environment and it is not a substitute for collective bargaining. It is neither a total solution nor something that can be implemented in the absence of adequate time. And, depending on the readiness level of the participants, it may not be the best approach.

Labor-management cooperation efforts often fail because of misconceptions about the process. Success is directly related to relationship building which involves much more than getting everyone together around the table. Those involved have to be honest about their needs and wants and have to focus on building trust and confidence in each other. Therefore, skills in group dynamics, listening, communication, and problem solving become essential components as group members work to redefine their relationships and build a solid foundation for change.

In addition to understanding the limitations of labor-management cooperation, educators should also be familiar with the assumptions about

- To provide sensitivity for employees.

  Employees learn to listen and to understand the problems of other employees. They become aware of their job responsibilities, feelings, behaviors, and attitudes. They learn to recognize and respond to the contributions of others.

- To provide a vehicle of communication for employees.

  Employees are provided with a means of sharing information that others need. They are assured that others are interested in their communications. They are provided with an opportunity to respond to information they receive.

- To provide support for employees.

  Employees receive information that what they do makes a difference. They are helped to realize that the accomplishments of the total organization are directly related to their performance and their effectiveness in their position (Fultz, no date, p. 8).

Similarly, theory Z bargaining (Pheasant, 1985), a labor-management cooperation process used in two Oregon school districts, communicates a sense of shared purpose through its goals which are:

- unity between management and union on the goals of the organization
- cooperative team approach
- genuine concern for employee welfare
- consensus decisionmaking
- emphasis on problem solving
- structure and styles that facilitate decision making
- concern beyond short-term benefits (p. 2).

These activities, and an increasing number of others in school districts throughout the country, are being initiated jointly by chief school administrators and teacher union leaders who have learned some lessons well. These practitioners share the belief that "many of the problems inherent in labor strife, the quality of instruction, and teacher morale can be resolved, and new, cooperative approaches to problem solving can help" (Dialogue, 1984, p. 13). As their goals suggest, they are incorporating a decisionmaking process that alters the traditional hierarchical structure and encourages teachers to exercise some judgment over what they feel is necessary for achieving school and district success.

Case Studies of Two Labor-Management Initiatives

The Melrose and Jackson school districts[2] are two sites where RBS staff assisted with implementing labor-management cooperation efforts. Case studies of those activities are presented in this section of the paper.

In both case studies, there are a number of factors that provided the impetus for establishing labor-management cooperation initiatives. Those factors are presented as background information in the first segment of each case study. In the second segment, a description of the initiation phase is presented, and in the third segment the focus is on the implementation process. The fourth segment of each case study discusses the institutionalization efforts and includes contextual factors that impacted program results.

Melrose School District Labor-Management Cooperation Program

The labor-management cooperation effort in the Melrose School District was initiated during the spring of 1984. It emerged as a vehicle for resolving a variety of issues that are described in the first segment on background information.

Background Information. The city of Melrose is in the northeast corridor of the country. Its population in 1984 included some 200,000 urban dwellers who resided primarily in three kinds of neighborhoods. There were a few redeveloped areas that were the result of gentrification efforts. There were a number of old ethnic neighborhoods that reflected an ongoing connection of family ties. For one-third of the residents, there were deteriorated dwellings where poverty, unemployment, and degradation flourished. Their problems, as well as other city dwellers' dilemmas, were compounded by the politics that permeated every aspect of city life, especially the schools.

The Melrose School District had 2,300 district and school-level employees, 31 elementary schools, 5 senior high schools, and approximately 33,000 students. There was a significantly larger student population in the district, but many of the children attended parochial or independent schools.

For several years, the district had experienced difficulty in meeting the standards set by the state board of education. As a result, county and state education officials were threatening to enforce their efforts to bring about necessary changes. Fiscal problems added to the mounting problems in the school district. A lack of trust and respect between labor and management heightened teacher skepticism of various district improvement projects and reduced their level of commitment and participation.

Decentralized decisionmaking was generally nonexistent in the Melrose School District; principals had relatively little authority to make decisions affecting their schools. Decisionmaking at the school and district

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[2]All names used in the case studies are pseudonyms.

level was usually influenced by the political machinery in offices throughout the city. It is important to mention here that politics reigned in the Melrose School District because school board members and top administrators were often appointees who served at the will of the mayor and who were frequently replaced when mayoral turnovers occurred.

A major force within the school district was the Melrose Education Association. The teachers' union was strong, financially healthy, and eager to assume a leadership role in districtwide school improvement efforts. In fact, members of the association's Executive Committee were instrumental in initiating and supporting the School Effectiveness Training (SET) program, a school improvement effort developed by the state teachers association that was in place in two of the district's elementary schools. In spite of their efforts, however, the programs were unable to flourish. Administrative and teacher transfers, a lack of district-level technical support, and a general managerial posture of benign neglect created ill feelings and a belief that the central office wasn't serious about addressing school improvement issues. This belief was further strengthened during the 1983-84 school year when an effective principals' group, initiated by the central office, was viewed by the teachers' union as conflicting and competing with the union-endorsed SET program.

During the winter of 1984, an RBS staff member was informed of the new group's existence while assisting with SET program activities. After investigating the matter, RBS staff contacted key management and labor leaders and encouraged them to work cooperatively to resolve the problem at hand. In March 1984, a group consisting of the district superintendent, the president of the teachers' union, an assistant superintendent, and a union Executive Committee member agreed to support a jointly developed plan for coordinating school improvement efforts and eliminating duplications. This group came to be known as the Melrose School District Labor-Management Coordinating Council.

Initiation. The first primary activity of the new district council was the development of a plan for the Melrose School Effectiveness Program (MSEP). With assistance from RBS, the group established five objectives:

- to set up a districtwide structure for management and labor cooperation to improve organizational effectiveness
- to prepare principals for instructional leadership roles in the school improvement program
- to implement the SET program in at least five new sites by January 31, 1985
- to design a Melrose School District inservice program to support SET activities in participating schools
- to implement a high school improvement program in the Melrose School District.

While a plan for the MSEP was being developed, RBS received information about a request for proposals from the Federal Mediation and Conciliation

Service (FMCS). This organization provides grants to private and public sector organizations attempting to accomplish the basic purposes of the Labor-Management Cooperation Act of 1978. After being alerted about the financial assistance available for labor-management cooperation activities, the district group decided to prepare and submit a proposal. The content of the proposed Melrose School District Labor-Management Cooperation Program reflected the original objectives of the MSEP. According to the proposal, the program would provide an opportunity for labor and management to work cooperatively to improve both the quality of work life for teachers and the effectiveness of the district's schools. Through a cooperative process, teachers and administrators at the school and district level would develop and implement school effectiveness programs with assistance from RBS staff. On May 15, 1984, a proposal and application were submitted to the FMCS.

During the remainder of the 1983-84 school year, the district council focused on its initiation activities. At this time, two individuals emerged as the program's champions. The group's chairperson, who was a teacher and an Executive Committee member of the Melrose Education Association, and a building administrator, who was a member of the state administrators and supervisors association, both appeared eager to resolve labor-management differences in order to carry out the agenda of the council. However, just as council operations were getting started, news of a major change in the district was announced. The superintendent, who had been in the district for some 10 years, was leaving.

The superintendent's resignation was one of several critical events that impacted the labor-management cooperation program. His replacement was a former principal who received a one-year temporary appointment. This new appointment resulted in a number of administrative shifts, among them a promotion to the central office for the building administrator who supported the council's labor-management program.

In the meantime, FMCS staff members requested modifications in the proposal to satisfy their requirements. After receiving the resubmissions, they completed their review and notified the district in July that it had received a $32,000 award. The stipulations of the grant were rigid, but the resources provided the impetus for continuing the labor-management cooperation plan.

Over the 18-month grant period, the district's plan focused on the following eight major areas:

- development of the district labor-management coordinating council
- development of a training program for the district labor-management coordinating council
- implementation of a training program for the district labor-management coordinating council
- review and selection of research-based improvement programs and practices by the district coordinating council

- development of plans and mechanisms for introducing and supporting school-level improvement programs and practices
- installation of school-level improvement programs and practices in the schools
- evaluation and revision of school-level improvement programs and of the Melrose School District Labor-Management Cooperation Program
- planning, development, and dissemination of a Melrose School District Labor-Management Cooperation Program newsletter.

These activities were to be conducted from October 1984 to May 1985. However, some of them were initiated before the funding period began. The council, for example, which had been operational since the spring, had selected a school improvement model and was developing plans for school-level implementation. By the time October arrived and the official announcement of the award was made, the council was extensively engaged in addressing the school improvement component of the cooperation process.

Implementation. During the period of the grant, district labor-management council members completed a number of operational tasks related to the eight major areas of their plan. The most significant of those tasks included:

- developing plans and strategies for disseminating the SET model
- identifying six schools to receive SET orientations, training, and technical assistance
- working with school staffs to set up school-level councils
- establishing contractual arrangements for SET training and follow-up activities
- assisting with training and follow-up activities
- coordinating newsletter activities and contracting appropriate personnel to develop and produce three editions
- preparing progress reports for the funding agency
- attending the Third National Labor-Management Conference in Washington, DC
- preparing and distributing an exemplary practices guide for all schools in the Melrose district
- reviewing and selecting resource materials to enhance the development and productivity of the district and school coordinating councils.

One critical factor that contributed to the completion of these tasks was the continued involvement of some highly qualified and committed individuals. Teacher leaders on the district council contributed a considerable amount of time to the process and each person was vital to the various implementation tasks. Their participation demonstrated an ongoing commitment to cooperation and a willingness to invest unlimited time and energy to making the project work. This commitment and dedication was emulated by many teachers in the schools who served as chairpersons of their councils, leaders of their task groups, and implementors of their school improvement plans.

In contrast, administrators throughout the district were generally less supportive of the process than the teachers. With few exceptions, their attendance at district council meetings was sporadic and their willingness to undertake tasks was minimal. As a result, their exposure to the operational aspects of the program was limited which, in turn, affected their working knowledge of the various program components. At the building level, some administrators did encourage staff members to participate in meaningful ways and contribute to decisions about how their schools should be run. Their support of the process helped teachers in some schools develop leadership and management skills while serving on coordinating councils and task groups that implemented the school development activities.

A major factor that inhibited the success of the labor-management cooperation process in the Melrose School District was the lack of upper management commitment to the project's goals. This problem resulted primarily from the constant shifts in leadership within the district. Specifically, during the first summer of the funding period, the superintendent, who had assumed the temporary position in the summer of 1984, was replaced by an acting chief. Two months later, that acting chief was replaced by yet another person who, for the remainder of the grant, remained as the acting superintendent of the district. In all, during a period of approximately three months, the district had three different superintendents at the helm.

The turnovers in district leadership produced shifts throughout the system. Among them were two changes that dealt the cooperation effort a major blow. The one central office staffer who was a proponent of the process and the administrator of the grant was relieved of his position midway through the funding period of the grant. His replacement was a former building principal from a SET school who reduced her overall participation in the cooperation process after she assumed her new administrative responsibilities. In spite of her formal obligation to the district council, she found it difficult to attend meetings, participate in council activities, and submit reports to the FMCS administrators.

Miscommunications between the FMCS and the school district eventually led to a temporary suspension of grant funds, which were not restored until the district council chairperson was made administrator of the grant. Throughout the duration of the grant, the relationship between the teacher leaders on the district council and central office managers deteriorated.

As support, assistance, and resources from management dwindled, so did the spirit of the labor representatives. Near the end of the grant's funding

period, the relationship between labor and management soured and the feelings of antagonism and distrust resurfaced.

Institutionalization. As the end of the funding period for the labor-management cooperation grant drew closer teacher leaders on the district council focused on satisfying grant requirements and avoiding more negative actions from the funding source. At this point, the morale of teachers on the district council was low and a mood of disenchantment had settled over the entire group. In essence, the teachers felt the central administration was not serious about working cooperatively to improve the quality of work life and the quality of education in the Melrose School District.

In spite of the dismal state of affairs, teacher leaders on the district council made one last ditch effort to address the issue of cooperation with the central office administrators. During the summer of 1986, a meeting was convened with key labor and management representatives to review the major issues. Once again, the issue of duplication of effort among improvement programs emerged, as well as the lack of commitment and support from central office staff.

The meeting that summer did not yield any useful results. Instead, it reinforced preconceived notions about the lack of seriousness of management's intentions. Throughout the problem-solving meeting, a series of interruptions kept various administrators from participating fully. After many intrusions, the meeting finally disbanded when the superintendent left to respond to another matter. A second meeting was scheduled a few weeks later to follow up on earlier discussions, but it was subsequently cancelled by management and never rescheduled.

When grant activities culminated later that fall, no efforts were made by labor or management representatives to continue the district coordinating council. At the school level, however, some councils did continue to meet and coordinate activities for the 1986-87 school year.

Later that year, Melrose School District administrators attempted to address the duplication issue. They agreed to use one school improvement model to facilitate change throughout the 36 schools. After reviewing various proposals from consulting groups, they selected a program similar to SET to become the district's school improvement model.

Analysis. A review of this case study yields a variety of factors that prevented the district council from engaging in successful labor-management cooperation activities. Major obstacles to success were the severe educational and fiscal problems, the pervasive political involvement, and the long history of labor-management strife in the school district. Add to those problems the multiple shifts in district leadership and the challenges that a cooperation program bring and you are left with a number of significant problems that collectively were too powerful to overcome.

The willingness of teacher leaders to actively collaborate with management suggested an awareness on their part of opportunities that could be created through labor-management cooperation. In addition, their stability

in the district and their ongoing participation in planning the collaboration prepared them for the many changes that would occur throughout the cooperation process.

Conversely, district managers were placed at a major disadvantage by the constant turnover of central office staff. New superintendents and their assistants engaged in the process without the appropriate knowledge and understanding of labor-management cooperation. This created feelings of skepticism throughout the ranks about the significance of the activities, management's commitment, and the union's role in the process.

In the final analysis, management representatives weren't able to contribute sufficiently toward maintaining and strengthening the process. As a result, their feelings of skepticism turned into distrust, a lack of commitment, and inadequate participation. These three major deficiencies subsequently led to the demise of the labor-management collaboration in the Melrose School District.

Jackson City School District Labor-Management Cooperation Program

A labor-management cooperative activity was initiated in Jackson City during the spring of 1984. It was initiated primarily by the district superintendent who was originally looking for a mechanism to link the schools in the district closer together. He found his mechanism in the district development council.

Background Information. Jackson is a fairly small northeastern city which has experienced an influx of wealth and limited prosperity after years of hard times and urban deterioration. Unfortunately, only small amounts of revenue have gone to improve the decayed portions of the city or toward alleviating the poverty of many of Jackson's 40,000 citizens. Except in those areas where major industry has facilities, the city of Jackson remains economically depressed.

There were 12 schools in the district: 7 elementary schools, 2 K to 8 schools, 2 junior high schools, and a regional high school. There were approximately 6,100 students and 475 faculty members. The district was led by a superintendent and a small central office organization. The staff of the district was stable and there was little turnover. In fact, many of the staff had been, themselves, students in the district.

The Jackson City Education Association (JCEA) was a weak organization, while the state association was exceptionally strong.

The schools reflected the shifting demographics of the community. At the elementary levels, the students were primarily black and Hispanic. There was slightly more racial balance at the high school where approximately 55 percent were minority; students at the high school came not only from the city of Jackson but also from seven sending school districts in nearby communities.

Jackson School District is located in a state where educational improvement is heavily regulated. The district had been dealing for some time with achievement problems on state proficiency tests and monitoring

from state education officials. While the district was not faced with immediate state intervention, there was the possibility of intervention in the future.

By 1984, several of the elementary schools and the high school in Jackson had been introduced to School Effectiveness Training (SET) by their state association and were at various stages of implementation. The state association was trying to persuade as many schools as possible to become involved with SET, which they had developed. They saw SET as a way to empower teachers, involve them in more decisionmaking, and advance a school improvement agenda. The teachers' association sponsored and facilitated two-day institutes for participating school staffs and involved them in setting priorities and engaging in shared problem solving and planning. After the institutes, help was solicited from third-party organizations to facilitate building-level activities.

Two elementary schools, the two K to 8 schools, and the high school in Jackson City were actively involved in SET when the superintendent, looking for something to link all the schools in the district closer, decided to form a district development council. His purpose was to increase communication between buildings, create "an ear to the superintendent," and increase understanding of systemwide issues.

Initiation. The first meeting of the district council was held with nine members in attendance. Those present included the superintendent and assistant superintendent, teacher representatives from the five school building councils, and two representatives from RBS. A representative from the local association had been invited but did not attend. There were no principals present nor were they invited. It was thought that building representation was key and each building council, in which principals participated, could select whomever it chose to attend district council meetings. In this case specifically, no principals were selected and all building representatives were teachers. The meeting was devoted to a discussion of the purposes of the council.

The group decided to meet once a month and a recorder was selected to keep and distribute minutes. The council was given its first assignment by the superintendent, which was to centrally schedule building-level inservice dates and coordinate programs. It became the district council representative's job to return to his/her school council to plan their inservice programs and then report back to the district council. To conclude their first meeting, the council wrote the following statement to describe its mission.

Jackson City School District Development Council

> The District Development Council has been organized to act as a forum for raising and examining districtwide school improvement issues. Its major function is to assist with the planning and coordination of improvement activities in the district. It also establishes a forum for information sharing among participating schools and serves as a communication link between the district and the school-based coordinating councils.

The composition of the Development Council will be as follows: the district superintendent; a local education association representative; a representative from each participating school coordinating council; and an assistant superintendent. A representative from the state education association and a staff member from RBS also will attend the meetings. Both the state education association representative and the RBS staff person have no official function or the council but will act in an advisory capacity to support the program.

The purposes of the School District Development Council are to establish a structure for reviewing and proposing policy relevant to districtwide school improvement, act as a catalyst for such improvement, raise funds for improvement activities when necessary, and provide participatory leadership in moving the district forward in education excellence.

Implementation. From May 1984 through the 1986-87 school year, the district council met regularly once a month. They accomplished the following activities:

- facilitated and coordinated a system for individual buildings to plan and evaluate their own staff development activities
- facilitated the establishment of SET councils in every school in the district
- developed a yearly science fair
- served as a clearinghouse and a resource for individual schools applying for outside project funds
- developed and publicized a district council charter which outlined the council's standard operating procedures
- planned council-sponsored social events where building and district council accomplishments were publicized and celebrated
- improved and facilitated more effective horizontal communication between schools
- improved and facilitated more effective vertical communication between the superintendent and building staff
- improved and facilitated more effective cooperative planning among schools within the district.

It was clear from the beginning that the district council played an important role for the teachers who regularly attended the meetings. It gave them an opportunity to interact in new ways, to talk about their building accomplishments, and to "toot their own horn." It also gave them an opportunity to interact with the superintendent in ways that they never had

before. For the first time, the teachers were hearing it from "the horse's mouth." The superintendent was sharing district issues and concerns with them and asking for their assistance.

There were several issues that stayed with the council from the time of its inception to the present. Issues such as the tension between roles and goals, the lack of principal participation, and the role of the local teachers' association had varying affects on the cooperation process.

Throughout the first three years that the council was in operation, there was always a certain tension between council goals and participant roles. The superintendent wanted the teachers who were on the district council to feel as if the council was theirs. He wanted the teachers to set the agenda and identify areas of focus. The teachers, however, looked to the superintendent to determine council priorities and steer them on the course he felt the council needed to take.

The tension between roles and goals did not seem to interfere with the operation of the council, but it did account for some difficulty in determining council priorities. Teachers, for example, may have wanted to address issues that would have a more immediate payoff for them, while district administrators wanted to focus on larger issues more directly affecting student achievement. Some of the tension between teachers and administrators was a natural one because the structure of the council called for all participants to explore new behaviors in relation to one another and there was a lot of natural testing of each other. The shifting back and forth between teachers and superintendent continued throughout the life of the council. Despite this confusion, the council did identify some areas of cooperation and produced some meaningful results.

The lack of principal participation did not directly affect implementation, but certainly affected institutionalization (discussed in the next segment). Their lack of representation meant that the entire mid-management level was left out of council planning. When principals were asked what the district council did, they could not respond knowledgeably.

It is difficult to determine how the lack of local association participation affected the operations and/or outcomes of the council. The local and state associations lent their verbal support and a state association representative would occasionally, when invited, attend council meetings, but there was never any ongoing presence. Lack of presence is probably best explained by the fact that Jackson is not a community characterized by any recent labor-management conflict. Contract negotiations occur with some tension but rarely with overt conflict, and Jackson boasts of having the second highest starting teachers' salary in its state.

Institutionalization. Despite the tension between the superintendent and the teachers, the council did not face any real critical point in its development until the superintendent retired. It was unclear whether the new superintendent, a former associate superintendent in the district, would want the council to continue. An appointment was made for the council chairperson and the new superintendent to meet before the start of the 1987-88 school year to discuss the council, its operations and its plans. In the meantime, the new superintendent spoke with the building principals

about their perceptions of the building and district councils. The response of the principals was unanimous. They all felt very positive about the building councils but did not think the district council served much purpose. Their response to the district council reflected their lack of participation. They were not going to support any structure within the system when they were completely left out of it. When the superintendent met with the council chairperson, he shared this report from the principals. The council chairperson countered with a discussion of how meaningful the council was to the teaching staff. The superintendent agreed to one meeting with the entire district council to announce his decision about the status of the group.

The meeting with the district council and the superintendent took place right after the start of the school year. The superintendent announced his decision that the district council would not continue but the building councils would. His feeling was that the district council did not serve a clear purpose and so he was discontinuing it. He was planning, however, to convene the group every now and then, especially if there was a crisis in the district. The council members were disappointed and disagreed with his analysis, but they accepted his decision to disband. This took place in September 1987.

One month later, the superintendent called a meeting of the district council, offered members of the council an opportunity to attend staff development programs, talked with them about building-level staff development, and scheduled the next meeting of the council for the following month. He had obviously changed his mind about the viability of the council. His only comment was that he had indeed changed his mind, that the council did serve the purpose of keeping him in closer contact with the building staffs. As a result of that decision, the council continues to meet monthly.

Analysis. As one studies the accomplishments of the council, two factors emerge as major contributors to this program's success: the existence of the district's coordinating council and the interpersonal relationships among district council members. While the building councils seemed to be the best structures for attempting to deal with the teaching/-learning issues, the district council turned out to be the critical mechanism for increasing understanding of where the district was heading, developing more comprehension relative to broader educational and political issues, and being a place where teachers and district officials could sit down, face-to-face, and share concerns and hopes.

Today, the district council continues, with new members and new priorities. Through the council's commitment to itself, its ongoing willingness to participate fully, and a growing level of trust in each other as committed, caring educators, the conditions are being created that will encourage continued improvement and innovation within the Jackson City schools.

Discussion and Conclusions

Labor-management cooperation initiatives indeed are not new under the sun. As Table 1 indicates, they have a long history in the United States, especially at the federal and industrial levels. In education, too, the number of labor-management cooperation programs is increasing as administrators and teacher leaders become more familiar with the various aspects of collaboration and decide to test the waters in order to deal more effectively with the range of problems facing today's educators.

We believe that labor-management cooperation in schools is an idea whose time has come. Given this belief, we've used the term labor-management cooperation to define our interventions and to promote cooperative decision making in school systems. Our choice of terms is not an arbitrary decision. It reflects our interest in giving significant attention to the relationships of the principal actors, which, as we said earlier, is a major component of the labor-management cooperation process.

Other educators, too, have struggled with the language that best defines their cooperation process. Numerous terms are used in the educational sector to describe the concept of cooperation. Prominent among them are participative management (Moeser & Golen, 1987), theory z bargaining (Pheasant, 1985), quality of work life (Haynes, no date), and shared governance (Malen & Ogawa, 1985). These terms and a multitude of other labels reflect the concern about what these cooperation models should be called. Educators, it seems, are intent on assigning a name to their process that appropriately describes their specific elements of cooperation.

These numerous terms should not create language barriers within the educational community. Instead, they should be viewed as tailored versions of structures that promote the process of cooperation. Likewise, their variations in design should not be perceived as conflicting entities. Indeed, many of the cooperative processes mentioned in this paper vary in practice from formal definitions of labor-management cooperation. But, like their names, they represent the numerous efforts emerging in the educational sector to address the collaboration between union and management representatives.

In closing, we'd like to move beyond the issues of language and design and reiterate the significance of trust, commitment, and participation to the success of any cooperative initiative. These three factors, which are dependent upon each other for their individual contribution, are the cornerstones of the cooperative process.

Trust is created when the participants involved respectfully and cooperatively establish a clear purpose for collaborating and reach agreement on the core issues they will address. Mission statements, letters of agreement, standard operating procedures, and goals and objectives all contribute to the development of trust, but they are only helping mechanisms. They must be accompanied by an agreement to respect one another and cooperate genuinely as exemplified by Jackson City's district coordinating council. Teachers and administrators alike were willing to actively participate and

give the structure a chance. As a result, they developed a level of trust among group members that positively impacted school improvement throughout the district.

Obtaining commitment requires both union and management people to see a collaborative initiative as their own. They must want the process to succeed, and must be willing to contribute the time and energy necessary to accomplish the various tasks. An attitude of acceptance and high involvement must be created throughout the school system to obtain acceptable levels of participation from the various constituent groups. The ongoing commitment of Melrose teacher leaders suggested they understood the importance of high involvement. Unfortunately, this didn't seem to be the case for Melrose district managers, who committed inadequate amounts of time and energy to the cooperation process.

School districts are comprised of a highly educated work force--one that is often untapped or at best underutilized. Effectively using this resource in the district can produce the kinds of improvements that are desperately needed throughout most school systems. Mere involvement in a cooperative initiative will not automatically accomplish the intended results. However, meaningful participation can strengthen the district's decisionmaking process, reduce resistance to change, maintain a two-way communication flow, develop a broader range of knowledge and expertise, increase commitment to the workplace, and provide intrinsic and extrinsic rewards for those who achieve success. Both the Melrose and Jackson school districts were afforded the opportunity to engage in meaningful cooperation efforts. For those who participated, the process provided opportunities to collectively address decisionmaking in the districts and to build solid relationships that could contribute to change in the educational process. In the case of those Melrose administrators who only provided lip service to the concept of participation, their lack of involvement represented a missed opportunity to bring about the changes that were needed in that district.

In all, union and management employees must sincerely want to relate to each other in more constructive ways. They must be genuinely interested in eradicating hostility and in developing alternatives to their traditional adversarial approaches. A labor-management cooperation initiative can give participants the opportunity to draw on each other's strengths and work cooperatively to effect change in attitudes and behaviors. This process can build the fundamental elements of trust, commitment, and participation and increase the possibility of sustained school improvement.

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