Relations industrielles
Industrial Relations

The Functions of the Research Officier in Trade Unions
Les fonctions de chercheurs dans les organisations syndicales

Harry J. Waisglass

Volume 21, numéro 4, 1966

Congrès de l'ICRRI - 1966
1966 - CIRRI Annual Convention

URI : https://id.erudit.org/iderudit/027732ar
DOI : https://doi.org/10.7202/027732ar

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Éditeur(s)

Département des relations industrielles de l'Université Laval

ISSN

0034-379X (imprimé)
1703-8138 (numérique)

Découvrir la revue

Citer cet article

Waisglass, H. J. (1966). The Functions of the Research Officier in Trade Unions. *Relations industrielles / Industrial Relations*, *21*(4), 561–571. https://doi.org/10.7202/027732ar

Résumé de l'article

L'activité du service de recherche d'une organisation syndicale dépend des préoccupations qui l'animent et des objectifs qu'elle poursuit.

Le Service des recherches des « Métallurgistes unis d'Amérique » étudie certes des questions d'intérêt général, telles la réforme de la fiscalité, la politique économique et sociale, la planification économique et sociale, les problèmes de main-d'oeuvre liés au développement technologique et à l'automation, mais l'essentiel de ces travaux est consacré à la recherche et à la mise en forme de données immédiatement utilisables dans l'action syndicale quotidienne centrée sur l'organisation, la négociation collective et l'application de la convention collective. Les informations concernant les salaires, les conditions de travail, les bénéfices marginaux, la situation économique et financière des entreprises, l'évolution de l'emploi seront rassemblées, étudiées puis diffusées aux organisateurs et aux négociateurs.

Par ailleurs, le personnel des services de la recherche est de plus en plus étroitement associé à la préparation des décisions que les dirigeants élus de l'organisation sont appelés à prendre. Cette situation peut présenter certains risques pour la Démocratie syndicale notamment lorsque les « professionnels » employés par l'organisation syndicale en raison de leur compétence sont tentés d'exercer les responsabilités qui appartiennent aux élus.

La prévention de cette difficulté suppose que les fonctions de ces professionnels soient clairement définies. Si le mouvement ouvrier est en droit d'attendre d'eux des recommandations pertinentes et un respect fidèle des décisions prises par les organismes directeurs, il doit en revanche reconnaître leur dignité professionnelle et considérer avec attention leurs avis.

Un effort particulier doit être fait dans le domaine de la recherche économique sans sous-estimer la portée des travaux entrepris par le Conseil Economique du Canada, il semble que ceux-ci devraient être complétés et étendus à d'autres aspects. C'est ainsi que ces disparités de revenus ne peuvent être expliquées par les seules disparités de productivité physique. En d'autres termes, l'augmentation des revenus des salariés ne saurait dépendre de la seule augmentation de la productivité du travail, il est notamment souhaitable et possible que ces travailleurs participent largement aux bénéfices réalisés par les entreprises, sans pour autant compromettre les exportations canadiennes par une augmentation des prix.

The Functions of the Research Officer in Trade Unions

Harry J. Waisglass

The author exposes the union approach to research from the perspective of the research department's functions, distinguishing the functions of the research officers from their activities, their methods and techniques.

The research *job* could be described simply and briefly in terms of its activities, but the research function involves a consideration of relationships: the varied and sometimes changing relationships which exist within the democratic structure of the trade unions.

The major activities of a union's research department generally reflect those of the organization. In the Canadian Labour Congress and its provincial federations the emphasis is on legislative and political activities. In the industrial and craft unions the emphasis is on collective bargaining.

In our union, the research work is aimed at the union's central purpose: to grow in strength and influence as a democratic organization with a mission to improve the lives of workers economically, socially and politically.

The job of the research department is to provide all levels and departments of the union with factual, technical and analytical information so that they may carry out their responsibilities more effectively. While the research staff is involved in varying degrees in related fields of union activity such as education, welfare, public relations, community affairs, politics and legislative presentations, the research services are concentrated mainly on providing assistance to the directors and staff in collective bargaining matters.

The research department collects and analyzes collective agreements, information on wages and working

WAISGLASS, HARRY J., Research Director (Canada), United Steelworkers of America, Toronto.

conditions, company financial reports, and economic conditions and trends in domestic and world markets. It helps to define bargaining goals, advises on bargaining strategies and programs. The research staff assists in every phase of collective bargaining, from drafting proposals through the actual negotiations of the contracts on economic matters. It prepares and presents briefs to conciliation and arbitration boards. Specialized technical services and professional advice are provided on matters such as pensions, health and insurance plans, SUB, extended vacations, and severance plans.

Organizers are provided with information to assist them in recruiting new members and extending recognition of the union as bargaining agent.

Because our Union does not rely exclusively on collective bargaining to achieve its social and economic goals, considerable research support is given to its efforts to influence public policies toward a more equitable income distribution, economic planning for full employment, improved universal welfare and insurance schemes (such as pensions, medicare, sickness and unemployment insurance), and education and training programs for employed as well as displaced workers. Attention is given to present and proposed legislation in these fields. The social and economic problems of automation and technological change are also studied. Assistance is given to labour representatives on various economic and social planning bodies.

While much of this work has become routine, formal and specialized, considerable attention, energy and interest are directed toward a search for new approaches to new and old problems. Survival and growth require adaptation.

Elected officers expect to be kept alert to the dangers of stagnation by research professionals who are encouraged to question prevailing views and challenge traditional approaches within a framework of loyalty to the union and devotion to the labour movement. The elected officers expect the staff experts to anticipate the problems which may arise in the areas of their specialization, to draw attention to them and to propose new policy solutions. New ideas and investigations initiated by the research department have led to such innovations as the Steelworkers' Group Health Centre at Sault Ste. Marie, Ontario.

A research department must serve the union's aspirations and its activities are integrated with the union's activities. At the same time,

however, the research staff must be sufficiently detached from the operational and administrative functions to view them objectively and to provide an efficient, competent and professional service.

For professional practitioners this presents a dilemma — a dilemma analogous to the eternal line-staff conflict in management. In unions it strikes deeper — to the very heart of the vital principle of democratic responsibility and control. The elected officers are responsible to the members for the union's policies and for the conduct of its affairs. The elected officers, not the research experts or other officials, must answer to the members and account for policy and administrative decisions. At elections they will take credit for successes, but they must also take the blame for failures.

Theoretically the professional staff are civil servants of the union and should continue to serve through changes in administration. In practice, however, the professionals tend to become more or less involved in the decision-making processes and to become identified with the administration. This tendency is particularly evident in unions with weak leadership, where elected officers avoid their decision-making responsibilities, where they demand political loyalty from the professionals and active engagement against administration opponents.

The temptation to usurp the decision-making authority of a weak, incompetent and ineffectual leader may prove too strong for some professionals to resist. If the professional yields, it may gratify his ego, but his professional integrity and the democratic union fabric will suffer as a consequence.

The function of the professional is to inform, teach, advise and assist the decision-makers. The actual decision-making must be left to those who are elected for that purpose. The professional's advisory function involves essentially a process of analysis, while decision-making is essentially a process of synthesis. In making a decision an officer must bring together information and advice from many expert areas.

Professionals in the union movement should have adequate opportunities to gain a sense of pride, prestige and importance from their work by serving in a professional manner that helps unions attain their goals without corrupting their democratic processes. Union research officers should be professionally trained in economics and related

disciplines. The labour movement should, in its own interests, promote the professional dignity and safeguard the professional status of its research officers so that they may serve the unions most effectively and efficiently in a proper advisory and consultative relationship.

However gratifying it may seem, I think that a professional in the union movement should avoid trying to corner a monopoly of expert skills and technical knowledge. Union men are against this as well as against other sorts of monopoly. And so they should be. It narrows the potential scope of professional contributions to the development of democratic unionism. It serves only to strengthen a persistent anti-intellectual bias and a suspicion of experts.

Rather, the expert should try to transmit his knowledge and help develop the skills of the non-professional staff and elected officers. In a sense his aim should be to work himself out of a job. A research officer must scrupulously avoid making decisions which are the legitimate function of union members and elected officers. His aim must be to make them less dependent on experts and not more so. He must not become involved in the internal conflicts and controversies of unions in a way that might undermine their democratic processes and that would destroy his professional advisory and consultative relationships.

It is the research officer's duty to give the elected officers and the negotiating committees, when they are engaged in collective bargaining, the best economic advice possible and to give it in a clear and precise manner so that it can be readily understood and used. The better the economic advice and its presentation, the easier it is for the decision-makers to make the right decisions and to obtain the necessary support of their members.

The research officer should complete his investigation of the firm and industry (in relation to general economic conditions and trends), collect and analyze the relevant information and give his recommendations and advice to the union negotiators before they decide upon the bargaining goals. As a result of his studies he may be able to call attention to matters that could have a bearing on bargaining strategies in the short, medium and long terms. He should try to clarify long-run objectives which for the front-line fighters tend to become blurred in the heat of battle.

We know that economics is not a precise science. We must therefore constantly strive to improve our own skills and the quality of the tools and materials with which we work. Confidence in the reliability of our analyses and advice must grow as we succeed in reducing the margins of error. We must maintain a high degree of pressure on government agencies to obtain more authoritative statistics, to improve their quality and to fill the gaps. At the same time we must have some sense of priority about where we should concert our pressures so that the most urgent needs will be met first.

Considerable attention has been drawn recently to the need for better information on labour supply and demand, by occupation, industry and locality. The Economic Council of Canada in particular has made valuable contributions in emphasizing the needs for improved labour market information among other manpower policies to facilitate mobility and raise productivity. The related needs for information on the remuneration of labour and management, however, escape attention. The studies and discussions of the labour market generally appear to treat the labour market, unlike other markets, as though it operated without a price function. Attention must be given to the needs for improvement in the quality and quantity of statistical data and analyses on remuneration: wages and salaries plus « fringe benefits » for all occupations including the managerial, technical and professional.

Because the work of the Economic Council has received much of our attention recently, it provides a convenient illustration of our concern with the improvement of statistical information and economic analyses. It should reveal also something of labour's interest in these matters.

An implicit assumption that runs through the Council's *Second Annual Review* is that income differences are either caused by or justified by productivity differences. In any event, the *Review* repeatedly and explicitly relates income differences to productivity differences. Several inconsistent measures of productivity are used and most of them are incomplete, in that productivity is measured by various types of income. Because productivity is frequently defined in terms of income, therefore the income differences actually are either justified or explained by themselves. The exercise really becomes quite absurd.

The best of the incomplete measures of productivity used by the Economic Council is net national income at factor cost, per employed

person. « The real income difference per person in the labour force between the two countries » is equated with the difference in « average productivity » between Canada and the United States. [1] Because capital cost allowances and indirect taxes are excluded, net national income covers only about three quarters of Canada's Gross National Product. As a measure of productivity it is incomplete. Such a restricted view of productivity would give government and business a large cut of the production pie before labour's share of the remaining production (national income) could be considered. For example: in 1964, indirect taxes (less subsidies) were 13.5 per cent of Canada's Gross National Product, compared to only 9.4 per cent in the U.S.; and capital cost allowances took 11.9 per cent of our GNP, compared to only 8.9 per cent in the U.S.

Further, « the higher quality of labour in the United States in terms of the relatively much higher level of educational attainment », according to the *Second Annual Review* [2] « has been calculated in very rough terms to account for well over a third of the productivity differences ». But how are the productivity differences to be determined as between persons? Of course, the productivity differences between levels of education are measured by the differences in the incomes of persons at those levels. If productivity differences are income differences, then incomes are different because incomes are different. This is tautology. It may be also a fallacy of misplaced concreteness.

The Economic Council has used some even narrower measures of productivity than net national income. « Per capita personal income is also a measure of comparative productivity... » [3] And futher: « Average earned income per person employed provides us with a rough measure of productivity per worker ». [4]

Of course, *per capita* personal income is not a measure of productivity at all. First, it divides personal income among the whole population, including all those who contributed nothing towards the production. Secondly, *personal* income is an even narrower measure than net national income because it excludes an even larger portion of the gross national product by removing all non-personal incomes such as dividends, interest and rents going to other than persons.

(1) *Second Annual Review*, page 58.
(2) The same.
(3) *Second Annual Review*, page 100.
(4) *Second Annual Review*, page 117.

Narrower still is the productivity measure based on average earned income per person employed because it excludes all but the labour income, on the unrealistic assumption that labour gets either all or a constant share of the total value of production.

How productivity is measured is a critical matter of concern to the unions because it cannot be separated from the problems and policies relating to the determination and distribution of incomes. Particularly because the Economic Council has given great prominence to the relationships between incomes and productivity for public policy considerations, the union research officials are compelled to give these questions careful consideration.

To be fair, the Economic Council has used better measures of productivity apart from those which are used in the consideration of income differences between Canada and the U.S., between regions, and between persons at different levels of educational attainment. The measures of productivity growth used in the analysis of the economy's performance and potential output are based on the *volume* of Gross Domestic Product in relation to civilian employment. *

* Second Annual Review, page 16.

It appears that the Council underestimates the productivity growth rate in the non-agricultural private sector of the economy. (See Table A). In any event the Council does not attempt to present any evidence to persuade us that it measures productivity more reliably than the D.B.S. We are led to suspect, however, that the Council exaggerates the inadequacy of Canada's productivity performance.

TABLE A

MEASURES OF PRODUCTIVITY GROWTH COMPARED : ESTIMATES OF DOMINION BUREAU OF STATISTICS AND THE ECONOMIC COUNCIL OF CANADA

		Average Annual Percentage Increase	
		1950-55	*1955-60*
ECOC : [1]	non agricultural output per person in non agricultural employment	2.3	0.4
DBS : [2]	output per person employed in commercial non-agricultural industries	2.9	1.8
	output per man-hour in commercial non-agricultural industries	3.7	2.4
	output per man-hour in manufacturing	3.9	2.5
	output per employed person in manufacturing	3.0	2.3

1—Second Annual Review, page 16.
2—Indexes of Output per Person Employed and Per Man-hour in Canada, Commercial Non-agricultural Industries, 1947-63. (Catalogue No. 14-501 Occasional).

The Economic Council leaves no doubt that it gives productivity growth a place of central importance for the attainment of Canada's social and economic goals. The *Second Annual Review* repeats the emphasis of the *First:* « productivity gains are the essence of economic growth and the real source of improvements in the living standards within any nation ». [5] « The strength of Canada's competitive position, as reflected in its international trade, is ultimately related, especially under a fixed exchange system, to the economy's relative performance in productivity and in prices and costs ». [6] « The most important current problem is to achieve and maintain adequate productivity growth. This is the key to economic growth and to rising living standards for Canadians ». [7] « ... a stronger advance in productivity is now called for if wage and profit conditions favourable to sustained growth are to be maintained ». [8]

This is the theme throughout the *Review:* productivity appears as monotheistic goddess, the fertile provider of all social and economic goodies.

Paradoxically, the exaggerated importance and prominence for the national economy which the Economic Council gives to productivity stems from its narrow view of productivity. By restricting its considerations of productivity to physical rather than value terms (going as far as relating changes in money wages to changes in physical productivity), it excludes consideration of the beneficial effect of higher export prices which can also be a « real source of improvements in the living standards within any nation », particularly for a nation with an open economy. Certainly for an economy as open as Canada's, which exports more than a fifth of its GNP in trade for imports, we cannot afford to neglect the important influence that our terms of trade (the prices of the things we export compared to the prices of the things we import) can have not only upon our standard of living, but also upon our economy's potentials for growth and its actual performance.

We don't dispute the claim that the prices for Canada's exports must be competitive with the prices charged by other countries for the same goods. Undoubtedly, we will not be able to sell our goods if we

(5) Pages 15-16.
(6) Page 23.
(7) Page 33.
(8) Page 35.

overcharge for them. We must challenge, however, the exaggerated claims for making Canada's prices more competitive in international trade. The Economic Council has been a respected contributor to such exaggerations which create the erroneous impression that reductions in the prices for our exports and increases in the prices for our imports are beneficial for Canada. This fallacy has been given popular currency. It indicates the challenges and the responsibilities for economists in the unions and elsewhere in respect to the economic education of their members and the public.

No doubt productivity gains are a necessary condition for economic growth and improvements in living standards, but economists must emphasize that productivity gains are not the sufficient and exclusive condition. If we can produce more nickel, copper, newsprint or wheat per man hour of work, Canada should be better off as long as we can buy as much oranges, grapefruits, coffee, bananas, or other things with a pound of nickel or copper, or a ton of newsprint or wheat. However, Canada's welfare is increased not only by productivity gains, but also by the higher prices it can get for the things our country produces for export, relative to the prices it must pay for its imports. Productivity and other things being equal, an increase in the prices for exports, or a decrease in the prices of our imports, will improve Canada's welfare, making more goods and services available for consumption or investment, raising the potentials for economic growth and improvements in living standards. The potential benefits of physical productivity gains can be offset by deteriorations in the terms of trade, or they can be supplemented by improvements in Canada's terms of trade.

The implication for wage policies is that value productivity, rather than physical productivity, is the most appropriate and equitable economic consideration in the determination of labour's share of output. Guidelines which restrict wage increases to gains in physical productivity condemn labour to a declining share of the value of output. If workers are to get a fair share in terms of the Economic Council's goal of « an equitable distribution of rising incomes », they must get their share of the benefits accruing from price increases as well as from the physical productivity gains.

In pressing the case for a « more internationally competitive economy », the Economic Council creates the impression that price reductions for our exports and prices increases for our imports are unmixed

blessings. However, the benefits of the increased volume of exports that may be attributable to the devaluation of the Canadian dollar were offset by the losses from the less favourable terms of trade. During the period 1959 to 1963, the Index of Export Prices (1948 as 100) increased 5 per cent compared to a rise of 13.1 per cent for the Index of Import Prices. Our terms of trade (the Index of Export Prices as a per cent of the Index of Import Prices), therefore, declined by 7.2 per cent. (See Table B). Thus, a large part of the potential growth benefits which were made possible by the gains in physical productivity for the economy were eroded by the less favourable terms of trade.

In the subsequent period, 1963-65, Canada's terms of trade improved by 1.9 per cent: export prices increased 3.3 per cent compared to a rise of 1.4 per cent for import prices. This improvement in our trading terms makes possible a larger increase in real wages and living standards than what could be obtained solely by the productivity gains.

TABLE B

CANADA'S TERMS OF TRADE: 1958-1965

1948 = 100

	Index of Export Prices	*Index of Import Prices*	*Index of Terms of Trade*
1958	120.6	116.5	103.5
1959	122.8	114.4	107.3
1960	123.0	115.5	106.5
1961	124.0	119.1	104.1
1962	128.1	124.5	102.9
1963	128.9	129.4	99.6
1964	130.7	130.8	99.9
1965	133.1	131.2	101.4
1959-1963	105.0	113.1	92.8
1963-1965	103.3	101.4	101.8

Source: D.B.S.

LES FONCTIONS DES CHERCHEURS DANS LES ORGANISATIONS SYNDICALES

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