

Considering the Many Facets of Volunteer/Union Relations

By Linda L. Graff

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LADY BOUNTIFUL IS ON HER deathbed. The upper-class woman of the 1800s administering unto the sick, the impoverished and the orphaned is an image of the past. Voluntary action is flourishing, but it does not often resemble the stereotyped notion of charity that the word "volunteer" still conjures up in the minds of many.

The motivating force behind volunteer work may continue to be, for some, the desire to "help others less fortunate." But a new wave of volunteers seeking involvement for reasons such as job prep-

aration, self-exploration and personal growth predominates.

Personal commitment to social or community change has sparked a movement of citizens getting involved in the decision-making that affects their own lives. Manifested in increasing numbers of self-help and community groups, neighborhood associations, environmental lobbies and special interest groups, volunteerism is playing a significant role in social advocacy.

As voluntary action expands into new areas and grows as a movement, we find volunteers performing a wide variety of work under all kinds of programs and sponsorship. While not solely confined to the social service, education and health systems, volunteers do continue to be concentrated in these settings.

Expansion of organized labor into the public sector has paralleled this expansion of voluntary action. Both the labor movement and the volunteer movement, of course, have existed for over a century, but it is a relatively recent circumstance in which both organized labor and volunteers share the workplace. This proximity and participation in simi-

lar spheres of service appear to have resulted in each movement taking more note of the other.

Despite the increasing prevalence of coexistence, relatively little has been written about the potential for either cooperative action or tension between the two. In fact, it has been suggested that the issue of volunteer-union relations is one that the volunteer community essentially has avoided for years. It is only in the last several years that we have seen this matter addressed, at least in [Canada], in the literature related to either movement.

Some organizations have examined their own settings and have developed policies about the proper function of volunteers in relation to paid staff. Yet, it appears that many others have not attended to the questions or continue to struggle toward resolutions satisfactory to all concerned parties.

In the past couple of years at the Volunteer Bureau, we have seen an increase in the frequency of requests for assistance around the question of volunteer-union relations. Initiated by voluntary organizations, these requests typically

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deal with such questions as "How can volunteers best work alongside paid staff?" "How can an organization maintain quality staff/volunteer relations?" and "What should the role of volunteers be in the event of a strike?"

The following discussion of volunteer-union relations is meant to guide administrators, coordinators, labor representatives and individual volunteers in their difficult and complex decisions. The reader will note a prevalence of diverse, and at times, competing views. It is impossible to recommend guidelines that would apply to many organizations.

What *is* recommended is a careful consideration of the issues by all voluntary organizations whether or not a bargaining agent is present. It is also recommended that they begin to take action to develop guidelines appropriate to their individual setting, and that they employ a tri-lateral decision-making process involving labor, management and volunteer representatives.

Monitoring the Delivery of Human Services: Potential for Cooperative Action

It is an extremely difficult task to sort through the administrative and financial dimensions of the contemporary human service system. For example, we can identify all of the following types of organizational and financial blends to be in existence now:

- Government departments delivering direct services
- Government-financed contracts for direct service administered through voluntary agencies
- Privately funded voluntary agencies delivering direct services
- Privately funded voluntary organizations engaged in social advocacy
- Government-supported "voluntary" organizations engaged in social advocacy
- Private business engaged in the delivery of direct services.

At the same time, we can identify the individual concerns and notions of labor, government and the voluntary sector about what the "ideal" human service system ought to be.

Add to this picture the current economic turmoil in which many are concerned about protecting paid positions and protecting programs and services as governments attempt to pull back on their support of the human service system, and as private fundraising efforts more frequently conclude short of target totals.

As the volunteer and labor movements both monitor the potential for governments to withdraw support of human services in the 1980s, concern arises over how services will continue to remain available. The voluntary sector has come to play a central part in the administration of the human service system while volunteers have moved through changing roles in relation to the delivery of services. Because the voluntary sector and volunteers have been prepared to monitor gaps in services and pilot innovative intervention methods, labor fears that a renewed involvement by the voluntary sector may facilitate government withdrawal.

If one examines the historical development of voluntary action and the objectives of voluntary organizations and volunteer groups, it becomes clear that neither is likely to accept diminished government involvement without protest. Examination of the concerns of labor around maintenance of a comprehensive and accessible human service system suggests that, rather than a growth in tension between the two movements, there exists a clear potential for cooperation between the volunteer and labor movements.

Sharing the Workplace: The Role of Volunteers In a Period of Economic Restraint

The most typical policy around the appropriate use of volunteers has been that volunteers do *not* do the work of paid staff. Volunteers have been employed to pilot new programs, add a client-centered dimension to a program or work as supports to paid staff.

While it can be said, at the most basic level, that volunteers do not do the work typically performed by paid staff, even this line can become blurred. For example, what may be defined in one agency as a paid staff role may be defined by another organization as a volunteer position. Or, a position defined at one point in time as a volunteer position (such as periodic "overflow" typing) may grow into a sufficiently large or continuous task to warrant a part-time paid worker.

At the policy or board level, similar complexities arise. In a large organization the work of treasurer or bookkeeper may demand the employment of a skilled or professionally trained staff person. A smaller organization may manage quite well with a volunteer board member who takes on this task or, as is often the case, a professional ac-

countant may volunteer his or her time to the organization to perform such work without remuneration.

In light of these complexities, generalized guidelines such as "volunteers ought to act in supportive roles to paid staff" are of little use.

Displacement of Paid Staff. It is very important to note the distinction between staff *displacement* and staff *replacement* by volunteers. Regarding displacement of paid staff, it is conceivable that volunteers could be recruited to do work that is currently performed by paid staff. In this situation, funding for the paid position(s) may continue to exist, but is turned to other uses while the program is maintained by unpaid workers. In this sense the availability of a volunteer labor force figures as a threat to the job security of paid workers. Because volunteers can be recruited to do such work, administrators would be able to cut paid positions and still maintain programs. This ability may be furthered because volunteers are more often bringing identifiable skills to their placements, and therefore can be requested to assume greater degrees of responsibility in more demanding or complex positions than in the past.

The displacement of paid workers by volunteers is an issue about which labor is legitimately concerned, although there is general agreement in the volunteer literature about this issue that is congruent with the labor position.

It is generally held by volunteer leaders that it is unethical to displace paid workers with unpaid workers. They feel strongly that while volunteers have a place in the delivery of services, it is a supportive role and should not be substituted for that of paid staff.

In addition to the ethical arguments against displacement, there are a number of other factors working to discourage such misuse of volunteer resources. For example, volunteers are in high demand. There are many more appropriate ways to use their time and talents.

Potential tension or actual damage can also result from displacement. The acceptance of volunteer involvement by paid staff and productive working relationships between paid and unpaid workers are crucial to the successful operation of a volunteer program. Even the suggestion of displacement as a possibility can be sufficient to introduce suspicion, mistrust or antagonism into the workplace. In such a climate, volunteers are less likely to be satisfied by their

involvement, job performance is likely to suffer and the program most certainly will be jeopardized.

Thus, while it may appear to be tempting to administrators of human service programs to consider the cost (wage) saving consequences of displacement, strong resistance to such a move can be anticipated from labor and even unorganized staff, and from volunteer program managers as well. The inevitable tensions and suspicions certainly will affect the program. It is unlikely that such a decision would turn out to be worth the costs in the long run.

Replacement of Paid Staff. The second issue surfaces when funding for paid positions is lost, and it is clear that the program cannot be maintained on any other than a volunteer basis. In these instances, outside forces, such as a shortfall in fundraising appeals or government withdrawal of support, work in such a way as to make it impossible to retain current (paid) staff levels. Administrators are encountering this situation more frequently under present economic difficulties. They must face, head on, the possibility of cutting services to clients at a time when client demand is expanding because of the same economic conditions.

The difference, then, between displacement and replacement focuses on timing. With displacement, the potential for using volunteers in service delivery could actually lead to cutting paid positions. With replacement, other factors demand reduction of paid positions and only then is the possibility of volunteer-based service delivery considered. In the latter case, the ethical arguments become less clear because volunteer involvement is not the cause of job loss and can sometimes be the only method available to maintain services to clients.

On one hand, it does seem unfortunate to deny services to "needy" clients when alternative delivery methods are within reach. On the other hand, as labor has pointed out, there are reasonable, long-term consequences of such actions.

Awareness of the potential to recruit volunteers to fill previously paid positions may actually prove to be a contributing factor in the decision to withdraw funding. For example, if government withdraws support for a service and hears no ardent protest from client groups (because the latter continues to receive some measure of service through volunteers), then that government action is easier. Even though agen-

cy management may protest loss of funding as much as possible, larger scale reaction to diminished funding may be "buffered" by the use of volunteers.

A second point to note here deals with the "masking of need" effect of replacing paid staff by volunteers. On the assumption that funding, at some point in the future, may become available, it would be more difficult to press for that funding if the services are being delivered, more or less satisfactorily, by volunteers. In this way, using volunteers could be a deterrent to future re-funding of paid positions.

These arguments against replacement appear reasonable and present the human service sector with a serious dilemma. On the one hand, clients may suffer from a temporary or longer-term absence of needed services. On the other hand, a short-term remedy may work against a long-term solution.

In a unionized agency, the bargaining agent will be present to monitor the potential for either replacement or displacement. The union may move to grievance proceedings and management runs the risk of both losing the dispute and trying to pull together the pieces of a sorely damaged volunteer/staff relationship. Even in non-unionized settings, the long-range risks of replacement and the ethical and practical dangers of displacement may be sufficient to discourage either.

Regardless of whether staff are unionized, management, volunteers and staff ought to be clear about the purpose of employing volunteers, what type of work volunteers will be requested to perform, and the limits to that work. Clear policy is required and ideally will be determined trilaterally among management, staff (or their bargaining agent) and volunteer delegates. All three parties should be consulted in the process of adding volunteer positions within an agency or in changing existing job descriptions.

The Canadian Union of Public Employees, for example, has taken note of instances where employers have misused volunteers in "attempts to take away the work of regular employees." To protect the work of the bargaining unit, it has a clearly worded clause dealing with this issue in the CUPE Standard Agreement, which can be negotiated into contracts:

Article 3.02 Work of the Bargaining Unit
Persons whose jobs (paid or unpaid) are not

in the bargaining unit shall not work on any jobs which are included in the bargaining unit, except in cases mutually agreed by the parties. (quoted in Calvert, 1980: 128)

As a "rule of thumb," one might examine closely the nature of the work to be done and determine on that basis who is best equipped to perform the task. While the general policy suggesting that volunteers ought to be confined to "supportive" roles in relation to paid staff can be kept in mind, the complexities of human service delivery make such generalizations nearly meaningless. It should be emphasized, however, that whatever the outcome of the decision-making process, volunteers and paid staff should be fully aware of how their positions relate to those of the other and where the limitations to those positions exist.

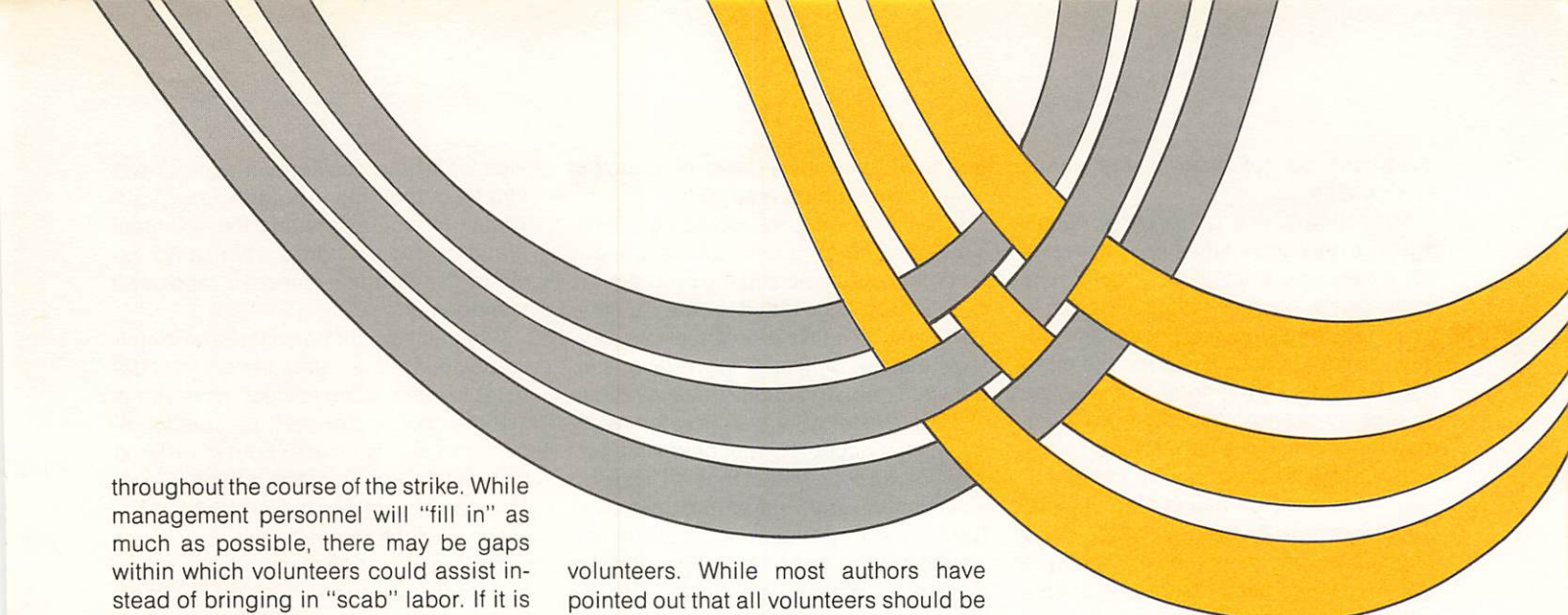
In circumstances where an agency is faced with funding cutbacks, the literature seems quite clear that volunteers should never be recruited to displace paid staff as a cost-saving alternative. That is, every attempt ought to be made to save those positions. If their loss is inevitable, however, an agency may consider maintaining some level of service through volunteer involvement. There are both short- and long-term risks associated with such a decision.

The Role of Volunteers During A Strike

The question of what the role of volunteers ought to be during a work stoppage is undoubtedly one of the most difficult and volatile within the issue of volunteer/union relationships. It is the question upon which one can find the most diverse perspectives and advice.

It has become clear to the Hamilton Volunteer Bureau through consultations with voluntary organizations that this question exists in many agencies that have not, as yet, determined policy or guidelines about whether or under what circumstances volunteer resources will be utilized in the event of a strike. It is also clear that the intense feelings that predominate during a work stoppage suggest that this question, perhaps more than any other, ought to be addressed immediately by all organizations in which a strike is at all possible.

There are a number of arguments in favor of employing the services of volunteers during a work stoppage. Depending on the nature of the work conducted by the agency in question, some essential services may be required to continue



throughout the course of the strike. While management personnel will "fill in" as much as possible, there may be gaps within which volunteers could assist instead of bringing in "scab" labor. If it is possible to outline, in advance, what these tasks will be and gain acceptance from staff or their bargaining agent, the use of volunteers may be a more palatable solution than the "scabs" alternative.

It may be even easier to gain acceptance for volunteers simply to continue their regular work but not to take on additional duties. In certain circumstances, such as a hospital or nursing home strike, the assurances, companionship and support offered by volunteers throughout the strike may make it much easier for residents or patients during that period. In an extension of this argument, it has been contended that by looking out for the feelings of patients, volunteers could actually act as a positive public relations factor for the union.

Because feelings run particularly high in the course of a public sector strike, with community attitudes playing a greater role than in an industrial-setting strike, more public attention is turned to the plight of the "client" caught in the middle. I. W. Bruce notes that if union agreement can be obtained for volunteers to perform these services to clients,

... it is often the case that the striking workers are quite pleased that volunteers undertake certain emergency duties. In this way, the union can then feel that it is being militant and pushing its sanctions to the limit but that the humanitarian instincts of union members can be satisfied with the knowledge that their action will not bring about undue suffering. More pragmatically, it will not result in a loss in public sympathy for the strike action because of extreme difficulties experienced by clients. (from "Volunteers and Labor Unions in Great Britain," *Volunteer Administration*, Vol. XI (3).

Another factor that may make the choice of using volunteers during a strike more feasible is the attitude of the

volunteers. While most authors have pointed out that all volunteers should be free to choose whether they will or won't cross a picket line, volunteers who willingly agree to do so undoubtedly will facilitate the decision to use them.

A series of eight guidelines concerning the relations between paid staff and volunteers was developed by The Volunteer Centre in Berkhamsted, England. This leaflet notes the problem of volunteers crossing a picket line and suggests

If volunteers are faced with a picket line which is not prepared to agree that the volunteer workers should cross, the volunteers should not attempt to do so but discuss the situation with their organizer of the voluntary service, who should, in turn, discuss it with union and management officials.

It goes on to note, however, that a prior agreement that is well known by management and all union members would reduce significantly the chances of such conflicts. In the event of a picket line, the Centre suggests that each volunteer be issued a document signed by management and a shop steward indicating the basis on which the agreement to work has been determined.

It is interesting to point out the guideline from this same organization about the role of volunteers during a strike. Consisting of delegates from labor and volunteer staff, The Volunteer Centre committee that developed these guidelines does not discourage the use of volunteers during a strike. It simply suggests a limit to that involvement:

Volunteers in the situation of industrial action should undertake no more voluntary work than they would do in the normal situation.

Any departure from normal work should only take place with the agreement of management and those staff organizations involved in the dispute.

Whatever the reason and variables in the decision to use volunteers during a strike, certain other guidelines and suggestions may be useful to add here.

Every attempt should be made to set policies cooperatively. The bargaining agent's involvement in determining and approving the volunteers' role during a strike would be ideal. Staff should have detailed information about this form of agreement well in advance so that they understand the limits of the volunteers' role inside.

Volunteers should also be informed (at their earliest contact with the organization) of the policy, expectations and limits surrounding their function during a strike. Some volunteers may choose not to be associated with an organization that uses volunteers during a strike. The volunteers' own position and philosophy should be respected at all times. Further, volunteers ought to be fully informed about what to expect if they are asked and agree to cross a picket line.

On Not Using Volunteers During A Strike. In the summer 1979 VAL, Peter Laarman ("Volunteers and Strikes: Good Motives Should Not Be Exploited") points out that the employer-employee relationship in a public employment context does not differ significantly from such a relationship in private industry. Public institutions and voluntary agencies, by definition, are not operating to make a profit and may therefore "give the impression that they are not really employers subject to labor-management problems." However, even without a profit motive, managers in the human service field are under extreme pressure to balance budgets and maintain services. The rights of workers to make wage demands and ensure quality working

conditions do not differ in the public service either.

Appealing to the question of "who's right?" in any strike situation is therefore not a very useful method to determine where one's role as a volunteer ought to be. In fact, it has been argued that "neutrality" should be the key principle guiding decisions. Bringing volunteers into an agency or institution during a strike may automatically establish the "side" with which volunteers will be identified.

While few could object to the rule that volunteers must be able to choose freely whether or not to volunteer during a strike, some contend that asking even a willing volunteer will place that individual in the middle of an unpleasant adversarial context. With the high public profile of a strike in the human services field and the greater tension Laarman contends exists in these settings, a convincing argument can be made against using any volunteers during a strike.

There seems little question that volunteer involvement during a strike will have the effect of prolonging the strike. Although volunteer services may make the experience easier for the patient or client, the net effect may be to draw the situation out longer. Laarman advises:

The best services a would-be volunteer can render in a strike is to do whatever he or she can to END THE STRIKE. Not only does a strike settlement mean restoration of the best possible services for the consumer, but it also means that volunteers can return to their proper ADJUNCT role in the institution.

An associated risk of volunteers continuing or expanding their regular roles during a strike lies in their potential to go "beyond their depth." Many factors contribute to this potential, such as a volunteer seeing things not getting done and from good intentions being tempted to "fill in"; the absence of usual levels of supervisory input for volunteers because staff are not present and managers are likely to be occupied with additional duties; the absence of adequate training or preparation of newly recruited volunteers or of volunteers recruited to do different work during the strike. Volunteers who perform their duties beyond their ability or their job descriptions can have dangerous results for the volunteers, the client and the agency. In a strike setting, the possibilities for volunteers to go beyond their limits are much greater.

Despite these risks and ethical arguments, some employers will value highly

the short-term advantages of volunteer involvement during a strike.

What must be fully considered, however, are the long-term consequences for both individuals and the program. As Sue Szentlaszloi noted in the summer 1979 VAL ("The Role of Volunteers During Teacher Strikes"), the relationship between paid and unpaid staff is crucial to a successful volunteer program. Without the full acceptance of paid staff, volunteers will soon detect tension, lose job satisfaction and leave the program. (Without a pay check, job satisfaction serves as the basis for high retention levels in a volunteer program.) It is obvious that paid staff are not likely to favor the volunteer who crosses the picket line or who, in any way, functions to prolong a strike. In perceiving the volunteer to be "on the other side," volunteer-staff relations in the post-strike setting will surely suffer.

When an agency, organization or institution in the human services field considers the possibility of a strike, there are many factors to think through before determining what role volunteers will fill. The decision is not an easy one and valid arguments exist in both directions. It appears that fewer risks accompany the decision not to use volunteers during a labor-management dispute, although it is also likely that service dependents will suffer more.

The Coordinator of Volunteers: Centrality and A Call to Action

The relationship between paid and unpaid staff is central to volunteer retention and to the smooth operation of volunteer services. If paid staff can feel the support of their unpaid coworkers without an accompanying threat to job security, and if volunteers can, in turn, feel approval for their work combined with a sense of personal productivity, the program will be much better assured of success. As manager of volunteer services, the coordinator is key to facilitating cooperative volunteer-staff relations.

The volunteer coordinator may hold a rather unusual position in many agencies or organizations. S/he is likely to be seen as an advocate for the rights and welfare of volunteers; s/he will be perceived in some senses as a personnel manager, and may play the additional role of department head. In an organized agency, the coordinator could be management, a member of the bargaining unit, or in an unusual instance, both. The

location of the position varies from setting to setting, but inevitably, as an advocate for volunteers and the volunteer program, coordinators are typically rooted in the middle—between labor and management.

Whether it would be better to be identified with labor or management is a debatable point. What is clear, however, is that the coordinator must be able to understand and work with both in order to look out for the interests of volunteers. This can often mean being centered between conflicting positions.

The onus must be placed on the volunteer coordinator to initiate discussions, to push for guidelines, and to ensure union, management and volunteers are consulted and informed throughout this process. The onus must be placed on the coordinator to keep communication open in order to maintain working relationships with both management and the bargaining agent.

There is no indication that economic constraints are magically going to disappear in the near future. There is no indication that government will suddenly reaccept responsibility for funding all human service positions. There is no evidence to suggest that unions are going to go away. The issues are going to be around for a while and the potential for tensions to increase exists.

While neither the labor movement nor the volunteer movement is new, the attention being paid by each to the other is a relatively recent phenomenon. That a potential for conflict between the two exists over the general question of "who is to do what in the human service system" and over the specific questions of replacement and the role of volunteers during a strike cannot be denied. However, a greater potential for satisfactory resolutions to these questions may develop if each movement will face the justifiable concerns of the other and move in the direction of early and continued dialogue. In most instances, it is likely that such communication will lead to the realization by both that a great ally exists in the other.

(Ed.'s note: In addition to the cited articles by Peter Laarman and Sue Szentlaszloi, the summer 1979 VAL contains another article on volunteers in strike situations by Rochel Berman. The issue can be obtained for \$3 (prepaid) from Voluntary Action Leadership, 1111 N. 19th St., Suite 500, Arlington, VA 22209.)