

NOTE: THE RATIONAL CALCULUS OF UNION ORGANIZING

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In his article "Reflections of a Rank-and-File Faculty Union Organizer at a Public University," Victor Devinatz detailed the strategy he employed in an unsuccessful attempt to organize faculty at his place of employment, Illinois State University [1]. His responsibility was to raise support for the union (the Illinois State University Faculty Association, affiliated with the National Education Association) in the College of Business. In his discussion, Devinatz cited prominently the model of Wheeler and McClendon [2], which lists three factors that might motivate an individual to support an organizing drive:

1. The rational calculation motive in which an individual weighs the cost and benefits of his/her vote for the union. If the individual believes that the benefits of union representation outweigh the costs of such representation, he/she is likely to tender his vote for the union. If the individual believes otherwise, he or she is unlikely to vote for union representation.
2. The emotional motive, in which the individual is motivated to support the union in response to some specific, employer-generated threat or other hindrance in the individual's current work environment.
3. The ideological motive, in which an individual will vote for a union simply because he/she identifies with the principles of collective representation [1, p. 211].

Although the union organizing drive ultimately failed, Devinatz suggested that because he adopted a "soft-sell" approach and because he was well-respected and not viewed as a radical, he was able to reach a large number of amenable faculty.

With these faculty members, he was able then to focus on the rational reasons to support the union. That is, he tried to emphasize the benefits of union membership while minimizing the potential costs of voting for the union. Although the union failed to win a representation election, Devinatz viewed his approach in the School of Business as largely successful. He was able to obtain union signature cards to authorize the election from just under half of the business faculty. In view of the traditional lack of support of business faculty for union-organizing efforts and in view of a dismal record of union support from said faculty in a previous attempt to organize, his efforts certainly seemed to improve the faculty's perception of the union.

The purpose of this note is not to question Devinatz's methods, but rather to point out an obstacle that exists whenever individuals consider the benefits and costs of joining a large interest group such as a union. The treatment here is derived from that of Mancur Olson in his seminal work, *The Logic of Collective Action* [3].

There are two difficulties involved in convincing an individual faculty member to vote to join a union simply on the basis of benefit-cost analysis. First, given the size of the faculty at Illinois State (680 members, according to Devinatz), an individual will correctly perceive that his/her vote will have only a marginal effect at best on the outcome of the election. Second (and more importantly), if the union-organizing drive is successful and the union is certified, the individual still will obtain the benefits of union membership even if s/he did not sign an election authorization card or vote for certification. The rational individual is then confronted with a choice in which the *added* (incremental) benefit of voting for the union is essentially zero. If there is any perceived positive incremental cost, perhaps in the form of possible retribution from the university administration, the rational decision from an individual's perspective is not to support unionization. Thus, even if the benefits exceed the cost of unionization for every individual in the prospective bargaining unit, no member would have a rational incentive to support the union. On that basis, the unionization drive should fail.

The difficulty that unions have in persuading members to support the organizing effort is a specific example of a more general principle stated by Olson:

. . . the achievement of any common goal or the satisfaction of any common interest means that a public or collective good has been provided for that group. The very fact that a goal or purpose is common to the group means that no one in the group is excluded from the benefit or satisfaction brought about by its achievement [3, p. 15; italics deleted].

In this context, if the union-organizing drive is successful, no member of the bargaining unit can be excluded from the benefits of union membership regardless of their support of the union during the drive. For precisely this reason, the economically rational individual would have little incentive to bear any

substantive cost to support unionization even if s/he would substantially benefit should the drive succeed. Thus, the classic free-rider problem is operative here [4, 5].

Devinatz is to be commended for the success of his tactics in trying to organize his colleagues in the College of Business at Illinois State. To obtain a near majority in a traditionally conservative, anti-union environment is no small accomplishment. Nevertheless, to attribute that relative success to appeals to faculty members' self-interest seems misplaced. Rather than rational self-interest, it is more likely that other emotional motives were at work.

ENDNOTES

1. V. G. Devinatz, Reflections of a Rank-and-File Union Organizer at a Public University, *Journal of Collective Negotiations in the Public Sector*, 30:3, pp. 209-221, 2003.
2. H. N. Wheeler and J. A. McClendon, The Individual Decision to Unionize, in *The State of the Unions*, G. Strauss, D. G. Gallagher, and J. Fiorito (eds.), Industrial Relations Research Association, Madison, Wis., pp. 47-83, 1991.
3. M. Olson, *The Logic of Collective Choice: Public Goods and the Theory of Groups*, Cambridge: Harvard University Press, 1971.
4. The same free-rider problem explains the attempt of unions to secure union-shop clauses in their labor agreements. This theme is well-developed in [5].
5. M. Dubofsky and F. R. Dulles, *Labor in America: A History*, Wheeling, Ill.: Harlan Davidson, Inc., 1999.

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