

ABSTRACT

Twiddy, Susan Elizabeth. What Works in Organizing? Applying Social Movement Theory to Building Labor Unions in North Carolina. (Under the direction of Dr. Jeffrey Leiter)

Social movement theorists have offered various explanations for participation by individuals in social movements. Two theories, resource mobilization theory and collective identity theory, propose very different motivating factors. Resource mobilization theory emphasizes a rational-choice decision-making process for potential participants, while collective identity theory states that individuals participate in social movements in order to achieve a feeling of solidarity and commitment to a group.

By using interviews with individuals involved in the labor movement in North Carolina, I have examined these two perspectives to determine their applicability to the experiences of labor movement participants. The interview responses of workers, organizers, and union leaders in several contrasting unions regarding the process of joining and maintaining membership in unions suggest a sequencing process that features elements of both theories. In particular, respondents note the influence of material incentives in the recruitment process, including promises of better pay and grievance representation. Subsequently, generating solidarity and feelings of commitment and responsibility to the group often encourage more active and long-term union membership.

These responses must be placed in the context of North Carolina's restrictive laws affecting unionism, the state's extremely low union density, and long-term elite resistance to unionizing action. This sequencing process of approaching

unorganized workers initially with material incentives, and then working to develop a sense of solidarity among union members may be a function of this hostile environment: workers who are unfamiliar with and even skeptical of unions cannot initially be attracted by the appeals of solidarity. Although neither resource mobilization nor collective identity theory appears accurately to describe the experience of joining the labor movement in North Carolina on its own, combining elements of both theories offers a more complete picture of why and how individuals decide to join and participate.

What Works in Organizing? Applying Social Movement Theory
to Building Labor Unions in North Carolina

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DEDICATION

This work is dedicated to SLM. You continue to inspire me, even now.

BIOGRAPHY

Susan Elizabeth Twiddy is originally from Raleigh, North Carolina. She graduated cum laude from North Carolina State University in December 1999 with a Bachelor of Arts degree in Sociology and a minor in English. While attending graduate school, she developed an interest in labor unions after completing research on public sector collective bargaining for the Hear Our Public Employees (HOPE) Coalition. She now works for a non-profit organization.

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INTRODUCTION

Although the American public and labor laws continue to support the right of employees to bargain collectively with employers, labor union density rates (i.e., the percentage of the labor force that belongs to a union) have fallen consistently over the past forty years to an average of about ten percent of the working population (Hirsch et al. 2001). Union leaders have attempted to respond to this decline by emphasizing the importance of organizing unorganized workplaces. In particular, the current president of the AFL-CIO, John Sweeney, has advocated that local unions spend thirty percent of their budgets on organizing efforts. It is clear that significant changes must take place in order for labor unions to remain viable institutions in the United States by increasing union density. This research will address these changes in order to answer the question, “Why do people join social movements such as the labor movement?”

Social movement theory offers explanations for participation that may be of use to the labor movement. However, conflicts between theoretical perspectives in some ways parallel the conflicts seen within the labor movement. As social movement theory has progressed, emphasis has shifted from focusing on the resources social movement organizations require to focusing on the collective identity that must be created among members. The purpose of this research is to use resource mobilization theory and collective identity theory to interpret labor unions’ efforts to change themselves. By examining responses from interviews with union leaders, organizers, and members, I hope to shed light on the processes of organizing, recruiting, and joining. It is my argument that neither theory provides an

adequate explanation for labor union participation, but that aspects of each theory can be blended in order to provide a more accurate and suggestive picture of why individuals choose to participate in social movements.

I will begin by offering a review of resource mobilization theory and collective identity theory. This will be followed by an explanation of my research method, specifically my interview topics and how interviewees were selected. In order to conduct this research, I have collected qualitative data from individuals involved with several local unions. These data consist of interview responses, observations of organizing seminars, and casual conversations with volunteer organizers, rank and file members, and individuals considering membership. I interpret this information by applying concepts relevant to resource mobilization and collective identity theories of social movement participation. My findings show that aspects of both social movement theories are applicable to the experiences of labor union organizers and to the process of organizing new members.

LITERATURE REVIEW

Social movement theory has developed in stages over the past forty years. Attempts to explain movement development, behavior, and success or failure have adapted to the current state of the theory. For this research, I will be examining two very important contributions to social movement theory that have conflicted with one another in the past: resource mobilization theory and collective identity theory. Each of these theories has benefited from contributions from a variety of sources, and both seem important in explaining the nature of social movements. The development of each theory will be explored, and then the two will be compared. Contemporary social movement theory is a blend of both theories, as social theorists have come to the conclusion that both concepts are necessary, in some way, to the success of social movements. I agree with this development of a blended theory incorporating ideas from the resource mobilization and collective identity theories.

In 1977, John McCarthy and Mayer Zald published an explanation of resource mobilization theory. This body of literature had been developing for a few years before this publication, but this article formulated the main ideas of the theory. Resource mobilization theory grew out of dissatisfaction with collective behavior theory (e.g., Hoffer 1951, Smelser 1963), which characterized participants as irrational, impulsive, overly emotional, and sometimes mob-like. Collective behavior theorists saw social movements as lacking strategies and as unorganized groups (Gamson 1975). In contrast, resource mobilization theorists wanted to emphasize the organization movements needed in order to be successful. In particular, McCarthy and Zald stated that the new theory was responding to the ideas

presented by social psychological or collective behavior approaches that emphasized the importance of strain on the individual, relative deprivation, grievances, and the growth of a generalized belief among participants. Essentially, these perspectives were very focused on the individual's decision to participate in a movement; that decision was seen as arising from grievances that might be resolved by the movement. However, McCarthy and Zald found that the social psychological/collective behavior approach was not addressing such important organizational issues as how social movements used resources and what resources were necessary for a movement to be successful. Their ideas moved beyond the individual-level concerns of earlier theories to introduce the importance of social movements as organizations that feature structural components (McCarthy and Zald 1977).

Resource mobilization theory, according to McCarthy and Zald (1977), "examines the variety of resources that must be mobilized, the linkages of social movements to other groups, the dependence of movements upon external support for success, and the tactics used by authorities to control or incorporate movements" (p.1213). The resources include a variety of tangible and intangible goods such as volunteered time, money, ability to travel, networking connections, facilities, and paid labor. Although earlier social movement theory had stated that grievances and generalized belief were necessary conditions for social movements to arise, resource mobilization theorists placed emphasis on additional conditions such as changes in the opportunities in the political system and the structure of a social movement where grievances could be channeled. Grievances always exist in

society, but what makes a difference is if there are “issue entrepreneurs and organizations” that are able to create a social movement around those grievances (p.1215). These issue entrepreneurs and organizations function to recruit participants into social movements.

The resource mobilization theory seemed to be influenced greatly by rational choice theory, as McCarthy and Zald pointed out, as participants are drawn in by incentives that make the costs of participating less than the benefits. By increasing the number of participants in a movement, individuals are able to achieve results that would not be possible were the individuals not working together.

These ideas are also a reflection of Olson's theory of groups (1965). Olson theorized that individuals have a propensity to free ride when possible, that is to obtain the collective goods provided by the group without contributing to the group's activities. Potential free riders would need to be coerced or offered incentives in order to contribute to a group's goals. The incentives offered by the group help to convince more individuals to participate. Olson theorized that small groups would be able to accomplish their goals more easily than large groups, due primarily to the high cost of incentives needed by a larger group to ensure contributions from all members and the availability of social psychological inducements available only in small groups (1965). Olson pointed out that labor unions started out as small groups, but as they grew larger unions were forced to use forms of coercion such as compulsory membership (the closed shop) and incentives such as insurance policies and legal representation (p.72).

McCarthy and Zald also focused on the organization and development of social movements. They clearly defined social movements, social movement organizations, and social movement industries as different components of a linked field. They defined social movement as “a set of opinions and beliefs in a population which represents preferences for changing some elements of the social structure and/or reward distribution of a society” (p.1218). A social movement organization (SMO) “is a complex, or formal, organization which identifies its goals with the preferences of a social movement or countermovement and attempts to implement those goals” (p.1218). Finally, a social movement industry represents “all SMOs that have as their goal the attainment of the broadest preferences of a social movement” (p.1219).

These levels of organization illustrate that multiple social movements can be contained in a social movement organization, and many social movement organizations could belong to the same social movement industry. For example, a social movement organization could contain branches concerned with human rights and with animal rights at the same time. The social movements for each of these topics belong to different social movement industries containing all organizations that are concerned with human rights or the industry representing animal rights. This method of organization also makes clear that social movements may exist without formal organization. However, those that become social movement organizations will require resources and more formal structures and goals.

The major goals of a social movement organization, according to McCarthy and Zald, are to gather and maintain enough resources to recruit and retain its

membership and to obtain goals related to social change. The goals may be actually to change some aspect of society, or the goals may be to be accepted by other actors as a legitimate organization and deserving of a “place at the table” (Gamson 1975). While resources may come from SMO members, resources may also come from conscience adherents and conscience constituents. Conscience adherents are “individuals and groups who are part of the appropriate SM but do not stand to benefit directly from SMO goal accomplishment”, while conscience constituents are “direct supporters of a SMO who do not stand to benefit directly from its success in goal accomplishment” (p.1222). Both of these groups are extremely important to SMOs because they provide resources to the organization without using resources as well. They are supporters because they believe in the goals of the movement. However, SMOs compete for the resources available from these constituents, and therefore SMOs must develop strategies for gaining and retaining the support of these constituents.

In conclusion, resource mobilization theory placed emphasis on the structure and organization of social movement organizations and industries. These groups compete with one another to gain the necessary resources for goal attainment. While some individuals within the movement may have resources to contribute, outside support is also necessary. Movements must also be strategically timed in order to be successful. This reflects the importance of the political environment. While grievances will always exist in society, in order for them to be successfully addressed a well organized and supported organization must step in to bring attention to the problems. McCarthy and Zald’s description of the theory, along with

important works by Gamson (1975), Tilly (1978), McAdam (1983b, 1986, 1993), Jenkins (1983), and Klandermans (1984), illustrated the importance of recognizing social movements as more than unorganized, spontaneous, grievance-driven, and sometimes irrational action by individuals as had been previously theorized by collective behavior theorists.

Although resource mobilization theory introduced new ideas and explanations into the body of social movement theory, some theorists still felt that part of the explanation was missing. Attempts to explain participation and success in social movements without involving the importance of identity and solidarity seemed inaccurate or incomplete. Indeed, the social movement resources drawn from member identity and solidarity sometimes seemed to be the most important resource of all (e.g., Fantasia 1988). Therefore, theorists introduced collective identity theory. This theory placed emphasis on the individual's role in the group, the sense of belonging, and the challenges movements face in sustaining that feeling. Collective identity theory offered an explanation as to why movements occur when and where they do, why some people contribute and others free ride, how strategies are chosen, and how movements influence cultures (Polletta and Jasper 2001). This theory did not exclude concepts of rational choice theory, but instead incorporated concepts such as solidarity into the incentives influencing participation.

Since collective identity is such a fluid concept, it is important to define what is included and what is excluded from its definition. Polletta and Jasper defined collective identity as "an individual's cognitive, moral, and emotional connection with a broader community, category, practice, or institution. It is a perception of a shared

status or relation, which may be imagined rather than experienced directly, and it is distinct from personal identities, although it may form part of a personal identity” (p.285). Distinguishing individuals’ collective identities from their personal identities is important, because the distinction emphasizes that individuals see themselves as parts of something larger than themselves.

Resource mobilization theorists and collective identity theorists each developed their ideas in response to the current social movement environment. Before resource mobilization was developed, collective behavior theory had been used to describe social movements such as Nazism, which, from a post-World War II perspective, fit the theory’s assumptions about irrational joining. However, with the development of the civil rights movement, participants did not wish to see themselves as an unruly mob, and theorists incorporated this change in attitude into resource mobilization theory. This theory reflected the change in the organizational structure and resource dependence that emerged along with these more structurally defined, successful movements. The civil rights movement offered many examples of the strategy and forethought that social movement organizers relied upon to guide the movement’s participants (Morris 1993).

Similarly, collective identity theory flourished along with a new set of social movements. These movements, such as gay and lesbian rights advocates and feminism supporters, were much more centered around the participants’ identities and gaining support for their statuses as members of a group. As our society has changed and individuals who once fought to gain political and economic equality have made progress in these areas, individuals feel freer to express their beliefs

concerning their statuses. These theoretical developments followed changes in the social movements themselves. No theory by itself has adequately explained all facets of participation and organizing thus far.

In order for a collective identity to become salient, individuals must recognize their bonds to the rest of the group. This may result through network connections, family bonds, friendship, or other means. When these bonds are important to the individual, the individual may choose to participate in the group, even when free riding is possible. Some individuals may choose to participate because it makes them feel better about themselves, or they may construct an identity for themselves as activists. In one way or another, the individual becomes enmeshed in the group, and begins to participate. Moreover, the social movement must also carefully maintain this group identity. At any point, an individual may no longer see the group as reflective of his/her identity, and may drop out. Social movements must balance between encouraging a group identity, and, at the same time, reflecting the individual member's identity.

Collective identity theorists introduced the concept of framing as one way social movements attract and retain members. "Frames' are the interpretive packages that activists develop to mobilize potential adherents and constituents" (Polletta and Jasper 2001). Frames give potential members a way to include themselves in the movement's goals. For instance, as Polletta and Jasper explained, the ACT UP movement proposed to gays and lesbians that participating in AIDS protests should be part of their identities as homosexuals (p.291). A social movement must generate some means of making individuals identify with and join a

group, and then must actively work to sustain a sense of solidarity among its members. One important strategy is for participating in the movement's activities to be seen by individuals as part of expressing the collective identity. This way, members are going to feel responsible for their role in the movement, and the whole group works toward achieving goals. This is a good method for reducing the free rider problem.

New social movements, such as the ones described above, require different tactics than the ones used in traditional movements, such as the civil rights movement. The tactical approach in an identity-based movement must match the identity of the group. It would be incongruous for a peace movement, where some members identify themselves as pacifists, to use violent tactics. The tactics used by each movement must creatively represent the collective identity of its members.

Another important tactical consideration is whether to adapt tactics to the situation. In some instances cited in Polletta and Jasper's article, organizations defined themselves differently when speaking to a broad audience than when discussions about goals were internal. Specifically, "Pulido (1996) found that nonwhite environmental-justice activists routinely invoked 'people of color' as a primary identity when targeting the state or a polluter but narrower racial and ethnic identifications in their internal movement deliberations" (p.294). This point illustrates that movements are operating in conjunction with many other movements, some of which present opposing views. This makes it necessary for members to have a strong collective identity, in order to retain members who may be attracted to other movements at the same time.

Friedman and McAdam (1992) pointed out that new social movements typically form out of existing movements and that once these new movements have successfully established a collective identity, movement leaders can decide just how the movement should progress. The new movement will have benefited from the resources and structure of the existing movement, which may give the new movement a better chance of operating successfully on its own. The collective identity can be used to widen or limit the number of members, to define the tactics that will be used, and to specify the movement's goals. Deciding who should be included in the collective identity is difficult, because large numbers may help ensure a movement's survival but will also be more difficult to control.

Collective identity theory is especially useful in explaining the solidarity seen in labor unions. Fantasia's *Cultures of Solidarity* (1988) described two conditions that must be met in order for union solidarity to be achieved: first, "that individuals come to accept a newly unfolding group logic and think in terms of what the group as *a whole* can accomplish, and second, that potential members become convinced that movement strategies can actually succeed" (p.214). It is extremely important that members believe that other members have or will join a group action in order for them to participate. When the relationships among workers are personal and close-knit, workers are more likely to choose to remain solidary rather than ride free. In right-to-work states, such as North Carolina, the free rider problem is potentially very detrimental to labor unions because closed shop provisions cannot be used to counter it. Recognizing effective methods of establishing solidarity among workers is especially important in such a hostile, free rider prone environment.

The free rider problem has been regularly discussed in the social movement literature. Schwartz and Paul (1992) gave four conditions that best explain when free-riding is not a problem: “1) There is an abiding sense of group fate, 2) There is a belief in the viability of group action as a strategy, 3) Individuals cannot distinguish themselves from other group members in terms of their capacity to contribute, 4) Personal ties among group members are sufficiently dense to activate group obligations in the face of free-rider impulses” (p.214-215). These four conditions reflect the importance of the collective identity, and, when met, are conditions for a sustainable social movement. However, these ideas are quite different from those suggested by Olson’s description of how to overcome the free rider problem. He theorized that the most important solutions are selective incentives and coercion, which have little to do with creating a sense of collective identity (1965).

In conclusion, collective identity theory, while not focusing on grievances as did collective behavior theory, addressed individual-level concerns that were excluded from the resource mobilization theory. The collective identity approach placed emphasis on the “we-feeling” associated with the new social movements that focus on personal, rather than political or economic, issues. This sense of solidarity and belonging to the group is essential in social movements and works to achieve stability and loyalty to the movement. While the collective identity is not the same as the personal identity, the two may be entwined. Individuals who identify themselves as “activists” see their collective identity as part of their personal identity, and this activist identity may influence the types of movements the individual joins, the tactics that a movement uses, and the structure of the movement itself.

Are the resource mobilization and collective identity theories incompatible or can they be intertwined? Although each has contributed important theoretical explanations about the development, structure, and maintenance of social movements, the two theories have been presented as independent explanations of social movements. However, social movement theory would benefit most by incorporating elements of each theory. In particular, resource mobilization theory has focused on the necessary structural elements for social movements to develop, have success, and remain viable. This theory's analysis of the resources needed both by individuals and the movement organization is useful for understanding the reasons why some movements are much more successful than others in recruiting and keeping members.

Resource mobilization theory contains important ideas for the study of social movements, but it does not include much explanation as to why individuals choose to participate. In particular, there is limited explanation as to why individuals who could obtain benefits without participating choose to do so anyway. Collective identity theory is more useful in understanding this idea. Individuals feel compelled by their relationships with others and a sense of solidarity to participate in collective action. Ties to other people, particularly close ties, have a strong impact on individual behavior. Individuals create their identities through social interaction. These ties to other people may help to explain participation among individuals who are not directly affected by, or may not receive the benefits from, a particular social movement.

Since both of these theories offer contributions to social movement theory, it is important to examine whether or not these ideas come from the same theoretical roots. This comparison is clearest with regard to the question, “Why do individuals join movements?” Resource mobilization had roots in rational choice theory. This theory stated that individuals analyze the costs and benefits of any action, and attempt to maximize benefits and minimize costs in their everyday lives. Individuals are motivated to ride free whenever possible, so as to gain the benefits of an action without bearing any of the costs. According to resource mobilization theory, individuals choose whether or not to participate in terms of the selective incentives offered by the social movement and participation. If these benefits outweigh the costs, individuals will participate. Therefore, social movement organizations must work to gather resources that may be used as these selective incentives. The organizations must also work to discourage free riding, so as not to provide incentives to any individual not helping the movement. Unions in the United States have had to work around legislation, such as the Wagner Act and the Taft-Hartley Act, that has created a large potential for free riding. By focusing on the costs and benefits of social movement organization that either encourage or discourage free riding, resource mobilization theory developed out of the rational choice school of thought.

Collective identity theory began with a different set of assumptions. Individuals feel compelled to participate in social movements due to a sense of solidarity, or “we-ness”. Individuals identify with others in a group, and choose to join them even when the costs of doing so may be high, which helps to explain why

earlier theories viewed participants as irrational. This theory had its roots in symbolic interactionism, which emphasized the shared interpretation of symbols between individuals, as well as identification and interaction with others in society as the basis of the self. Therefore, using labor unions as an example again, certain workers identify themselves as “working class”, “blue-collar”, “union people”, or as belonging to a certain craft. Along with these labels, these individuals feel compelled for a variety of reasons to participate in activities and beliefs associated with the labels. If an industry is primarily unionized, an individual may feel compelled to join the union out of a sense of wanting to belong to that group. This may happen even if the costs of joining, including dues, harassment, wage loss, or possible job loss, are higher than the potential benefits, such as wage and benefit gains or improved status. The most reasonable explanation for doing something potentially harmful to oneself is that the individual feels some responsibility to the group or to the cause for the action. Collective identity theorists would state that the individual is acting out of a sense of solidarity, gained through interaction with others.

Examples of each theory are prevalent in the labor movement literature. Organizing campaigns were seen as less of a priority than servicing existing members until a fairly recent resurgence in grassroots organizing (Bronfenbrenner and Juravich 1998). Traditional campaigns often did not include rank-and-file participation in organizing efforts, but instead relied upon the standard techniques such as leafleting, house calls, and rallies; all utilizing paid staff. However, once these tactics were expanded to develop leadership within the rank-and-file,

campaigns began to be more successful (Bronfenbrenner and Juravich 1998). According to Bronfenbrenner and Juravich (1998), the most effective outcomes were seen by unions using multiple strategies involving bottom-up leadership, by cultivating a sense of responsibility and a desire to participate among memberships.

Unions such as the Union of Needle Trades, Industrial, and Textile Employees (UNITE), the Service Employees International Union (SEIU), and the United Electrical, Radio and Machine Workers (UE) have gained the reputation of utilizing these new, diverse tactics. Other more traditional unions have also started to see the benefit of cultivating this sense of solidarity, particularly in hostile environments. International Brotherhood of Teamsters locals and others are now using organizer-training programs such as the Construction Organizing Membership Education Training Program (COMET) and Union Summer in order to diversify and expand the number of organizers working in the labor movement. These developments reflect the growth of social movement theory from resource mobilization to collective identity into a new period recognizing the important contributions from each theory.

By examining the roots of collective identity and resource mobilization theories, it may appear that the two theories are incompatible. Resource mobilization focused on the rational choices made by the individual and the organization in terms of joining and maintaining membership in the organization, as well as strategies and goals of the movement. On the other hand, collective identity theory had symbolic interactionism as its base, which relied on the relationships between individuals and society, independently of cost-benefit analyses. Collective

identity theory allowed social interaction and its rewards to enter into the cost-benefit analysis of resource mobilization theory. The question still remains of how to incorporate these theories into a broader social movement theory. Although research in this area is still developing, it is important to note that these theories have developed in conjunction with changes in the types of social movements. Therefore, the explanations surrounding social movements have changed significantly over time. It seems reasonable to expect that social movement theory will continue to progress, and will eventually offer an explanation that will satisfy both the idea that resources are necessary for movement success as well as the idea that some members will choose to participate even when those resources are unavailable. New theoretical developments along these lines will be discussed in the conclusions of this paper.

QUESTIONS, HYPOTHESES, AND EXPECTATIONS

I began this research with several questions based on my examination of these social movement theories. First, why do individuals join social movements such as the labor movement? Secondly, does one or the other social movement theory characterize particular labor unions? Finally, is one theory more useful for labor movement leaders as a guide for attracting new members?

After examining the literature on resource mobilization theory and collective identity theory, I began with certain expectations about the responses of the workers, organizers, and union management personnel. According to the resource mobilization theory, workers would be weighing the costs and benefits of joining a labor union. If the organization offers the selective incentives necessary to cover the costs of participating in the union, the individual should join the organization. The organizers must be actively working to develop and present these incentives in order to attract new members. Workers must be approached strategically, in terms of timing and opportunity. The union management would be working to increase the resources held by the organization in order to be able to offer selective incentives, and individuals at all levels of participation must work to discourage free riding. This is extremely difficult in an environment such as North Carolina's. The union management structure would be more bureaucratic and traditionally organized, in order to create an effective structure for mobilizing, allocating, and controlling key resources.

My expectations according to the collective identity theory were significantly different. Workers would be connected to one another through social ties.

Individuals who have familial connections to labor unions would be more inclined to participate, as would individuals who work in areas that are close-knit, either geographically or in workplaces. These ties create a sense of solidarity among workers, as well as a willingness to participate even when the costs outweigh the benefits. The members would see “union member” as part of their personal identity, or as inextricable from themselves. Organizers would be working to foster this identity by framing participation as a necessary part of being a “union member”. Union management would support the solidarity-building efforts of the union organizers and would likely have a less bureaucratic or traditional organizational structure in order to effectively present itself as part of the union membership.

However, I also had the expectation that none of the unions that I studied would strictly conform to one or the other of these descriptions. I expected that it would be more accurate to expect that the unions would reflect elements of both social movement theories, but might display concepts from one theory more than the other. These expectations would be examined through my interviews with workers, organizers, and managers in labor unions.

I began with the assumption that there is a division between business-model unions and social movement unions, as suggested by Bronfenbrenner et al. (1998). Business-model unions rely on a traditional bureaucratic hierarchy and focus on servicing current members more than on organizing new members. Social movement unions have a broad social justice agenda, emphasize organizing new members, encourage activism among current members on multiple issues including issues outside of the labor movement, frequently use volunteers as organizers, and

place less emphasis on organizational hierarchy. Business-model unions seemingly mirror the concepts outlined by the resource mobilization theory, while social movement unions tend to reflect more of the concepts in collective identity theory. I also expected that, while particular unions would lean towards one of these categories and support one theory more than the other, elements from both models and from both theories would be present in most unions.

DATA AND METHODS

Seemingly every article or book that centers on the contemporary labor movement begins with a grim outlook. This is a result of continual declines in union density levels since the late 1950s. Changes in leadership and the economic environment in the United States have not been able to revive the labor movement. These declines in participation leave workers without much confidence in the ability of labor unions to improve their working conditions or standard of living. In response to pleas from the national AFL-CIO to devote more resources to organizing new members, some unions have attempted to restructure their organizations and redefine their missions.

In this research, I use interview data in order to analyze these changes in union perspectives on organizing. I will interpret the data with the explanations offered by resource mobilization theory and collective identity theory regarding social movement participation. I wanted to gather data at three levels: first, at the individual level, reasons that workers join or do not join labor unions; at the interactional level, the interaction between organized and unorganized workers and the labor union organizers; and third, at the organizational level, the contrast between unions that operate with different goals and organizational structures to evaluate how well the unions' strategies reflect the theoretical models of resource mobilization and collective identity. By gathering information from these three groups, I would gain a fuller understanding of the priorities of each union at all levels of the organization.

To guide the interview process, I developed a list of important concepts from each theory. I wanted to gather the information without telling the interview subjects too much about the project, in order to avoid shaping their responses. Therefore, the interviews consisted of open-ended questions regarding the resources the respondents thought were important, the organizational structure of their unions, demographic information about their membership, how workers assessed the risks of joining, and the use of selective incentives in the organizing process. These concepts measured important aspects of resource mobilization theory. For collective identity theory, the questions were centered on concepts such as solidarity, social networks or ties, identity maintenance, and framing. I was then able to interpret the respondents' answers using concepts from the resource mobilization and collective identity theories.

I limited the data collection to workers, organizers, and union leaders who work in North Carolina, because a single legal environment affects them all. All private-sector unions are subjected to right-to-work laws in North Carolina. A unionized workplace in a right-to-work state must represent all workers at that workplace, regardless of the worker's membership status. There is a prohibition against closed shops, which are often used to prevent free riding. By only focusing on contemporary organizations within one state, I limit the variation possible in the unions I study. It is important to remember the restrictiveness of the laws in North Carolina, which currently ranks as the state with the lowest union density in the nation. This environment certainly shaped the responses gathered during the interviews.

The labor unions included in this research are from both the public and private sectors of employment. Although this was not the ideal situation for making comparisons between the unions, it was necessary due to the small number of available contacts in North Carolina. Two of the unions included in this project are fairly large, traditionally bureaucratic organizations. Both represent workers in multiple industries. They both feature elected officers, boards of trustees, and a top-down organizational style. However, one of these two “traditional” unions has been working to improve its organizing capability using some new techniques. These will be discussed later. I also included one other union that is seen as very progressive. This union was built as a grassroots effort, and uses more of a bottom-up organizational style. Although there are elected positions within this union, these positions are all held by workers. A board comprised of union members makes all of the decisions regarding the union’s mission and organization.

I was referred to several union organizers in North Carolina through a source at the AFL-CIO. I contacted these individuals by telephone and asked if they would be willing to participate in an interview session. Several individuals declined due to reasons of confidentiality imposed by their union organizations. These individuals were involved in active campaigns, and had been asked to not speak with anyone about their activities. I assured the individuals who agreed to participate of anonymity in terms of their names and the names of their unions.

The organizers gave me access to workers who were either already members of their organization, or were considering becoming members of the union. I had more casual conversations with these individuals, and these conversations focused

on their reasons for joining, or considering joining, the union. The organizers also gave me the names of their superiors. I was interested in union management's views on organizing. These individuals were asked questions similar to those asked of the organizers in formal interview sessions. All of these workers and union managers were assured of their anonymity as well.

There are a total of nine interviews, some with individuals and some with groups. I interviewed workers from two different unions, mostly as groups. I interviewed five workers in Union 2 and four workers in Union 3. I spoke with some of the workers in a group, and others individually. I interviewed five organizers from the three unions. Three of the organizers work for the same union, and the other two work for two different unions. I interviewed a management employee in Union 1 and Union 3. These relationships are shown in Table 1. This research used a small sample of interviews; therefore it would be difficult to generalize from the findings. However, these interviews may offer some information about the applicability and usefulness of resource mobilization theory and collective behavior theory for North Carolina unions.

Table 1. Table of included interviews and union organization.

Union 1 Traditional	Union 2 Traditional/Progressive	Union 3 Progressive
↓		↓
Manager 1	↓	Manager 3
↓	↓	↓
Organizer 1A supervises	Organizer 2	Organizer 3
Organizer 1B	↓	↓
Organizer 1C	↓	↓
	Workers 2	Workers 3

The questions I posed were designed to lead interviewees to reflect on their goals for union participation, their career paths, their understandings of their unions'

mission, their experiences with joining and participating in the union, and their outlooks for the future. The interview questions are listed at the end of this document. Each interview lasted approximately one hour, with follow-up questions answered either on the telephone or via email. After being interviewed, several participants extended further invitations to observe union meetings or other activities at their respective locals. Some information from these additional sources is also reflected in my observations regarding the attitudes and actions of the organizers, their unions, and the union membership.

There are significant limitations on the generalizability of any conclusions drawn from this study. The small number of interview subjects, the inclusion of unions in both the private and public sectors, and the restriction of data collection to North Carolina make the data analysis very specific. Also, by not using audiotapes during the interviews, there are not many direct quotations attributed to the interview respondents. The responses detailed in the interview section represent my best recollection of the responder's answers. Despite these limitations, certain patterns in the data offer the opportunity to further explore and develop social movement theory.

INTERVIEWS

Workers

The first workers I spoke with, Workers 2, were five members of Union 2, most of whom had been members for many years. However, there were two young men who had only joined the organization a year ago. I spoke with several of the workers individually, and then with all of them in a group discussion. After briefly describing this research project, I asked the workers about their jobs. All of the workers I spoke with in Union 2 work in industrial settings. Most had worked in the same field for their entire careers. Four out of five were male.

I was most interested in why the individuals had chosen to join the union. The most common initial response had to do with incentives such as higher pay, better insurance benefits, and job security. All of the workers expressed a need for the union's participation in order to achieve the levels of these benefits that they had received. However, after expressing these feelings, there were also statements about the sense of commitment they felt to the union. Many of the individuals had moved to this area from other parts of the country where unionism was much more tolerated and even seen as a way of life. In this industrial sector, union membership was expected in most parts of the country. Two individuals expressed shock at the lack of union participation in the South, and particularly in North Carolina. They were interested in participating in organizing campaigns within the union on a volunteer basis.

Workers 2 were concerned about the lack of union presence in their industry and in this area. The companies that employed them were losing contract bids

because of union demands. Yet rather than blaming the union for “costing” them contract jobs, the unionized workers blamed the unorganized workers in their industry, because those workers were willing to settle for less pay and fewer benefits. There was a level of commitment to the union on the part of Workers 2 and recognition by both the members and the union management that the members would have to participate actively in the union in order to change this scenario.

I was somewhat surprised at the level of participation by Workers 2. My initial impression was that this was a fairly traditional, business-model union. I had not expected to see this level of commitment to organizing and to see the members and union management working together. Even the two young men who had only been members for a short time were dedicated to organizing new members. They had made the connection that their situation would not improve until many more workers in the industry were raised up to the union’s level of expectations. Although the initial reasons for joining were usually personal benefit, the members clearly felt a sense of camaraderie and responsibility both to each other and the union as a whole.

The second group of workers that I spoke with, Workers 3, was smaller, but it was comprised of two individuals who were members of Union 3 and two individuals who were considering joining Union 3. These workers work primarily in the service sector, but they do not have a contract with their employer. Those who were already members had only been so for a short time, and others were being introduced to the union for the first time. There were equal numbers of men and women, and they were all probably in their mid-to-late thirties.

I had expected to find slightly more militancy or commitment to social justice from Workers 3. Union 3 is known for its progressive ideas and grassroots campaigning, and I thought that Workers 3 would vocalize this mentality. However, their responses were quite similar to the initial responses of Workers 2. Each began by discussing his or her expectations for pay raises, and then two individuals gave me details about difficulty dealing with their supervisors. These workers had been “written up” for disciplinary issues, and Union 3 had written letters to their department supervisors in order to have discipline reports removed from the employees’ files. Workers 3 explained that this was necessary for them to be eligible for pay raises on a higher scale in the future.

All of the workers, both members and nonmembers, in Workers 3 had issues with the treatment they received from their supervisors. They voiced many complaints about favoritism and inconsistent enforcement of rules. Unionization was seen as a solution to these problems, but some workers were not yet convinced that they should join. One unorganized worker asked a member how soon her complaints would be addressed once she began paying her dues. There seemed to be an expectation that joining Union 3 would result in immediate benefits, and the member did not refute this expectation. These “bread-and-butter” issues were of the sort that I had expected to find in business-model unions, yet these were members of Union 3, a union with a more progressive reputation.

Along with these problems, there seemed to be distrust among Workers 3. There were discussions about fellow employees, working at the same level, who might try to get the organized employees into trouble or discourage the employees

who were considering unionization from participating. These employees “kissed up” to management, so the members of Workers 3 did not trust their co-workers.

Although some of Workers 3 had worked at their place of employment for several years, they did not know many of their co-workers well because they were frequently moved from one area of operation to another or had to change shifts. Therefore, the mistrust seemed to grow from a lack of knowledge about their co-workers. This was not the attitude of solidarity that I was expecting to see, according to the collective identity theory. It seemed unlikely to me that the members of Workers 3 would ever be united against anything.

While all of Workers 2 and Workers 3 explained that their initial reason for joining the unions was based on the selective incentives that were offered, neither group was without elements of collective identity, as well. In particular, Workers 2 placed great importance on their relationships with other members of Union 2 and recognized the necessity of organizing. If anything, Workers 2 from Union 2, a more traditional union, showed more collective identity than Workers 3 from Union 3, a grassroots union. In order to better understand how workers such as these were recruited into the labor movement, I interviewed several union organizers. Their responses helped to explain the priorities of different unions, and how these priorities help to shape the experiences of union members.

Organizers

Several of the individuals with whom I have spoken are lead organizers who have been involved in union organizing for decades, while others are relatively new

to the job. Some were in hired positions, while others held elected positions. All of the organizers worked for unions that represent workers in multiple industries.

Everyone that I spoke with expressed the feeling that they have experienced relative success, particularly in North Carolina, which was identified by Organizer 1A as the worst state to organize in (and he has worked in all of the right-to-work states across the country). However, not all of the organizers planned to stay in their occupation for long. The younger organizers, Organizer 1B and Organizer 1C, stated that they saw themselves moving into different types of work, while the older organizers seemed to be comfortable with the career status that they have achieved.

I was most interested in discovering the organizers' feelings about the focus of their unions—is the union oriented more to organizing or to servicing members? This would be a good indication of the union's involvement in a broad-spectrum social-justice campaign or a commitment more to a business-model. I found that it is difficult to get an organizer to say that their union focuses on one aspect more than the other. Indeed, it was probably unrealistic to think that unions would care exclusively about servicing their members or about organizing new members. They have to do both in order to remain viable over the long term. Organizations that do not recruit new members will face declining participation as older members either leave the workforce or switch employers, while organizations that only focus on bringing in new members will likely lose support from those previously recruited if these members feel neglected for a long time. I was also interested in whether the union participates in activities with other organizations in the community, how large its allocations for organizing are, and what set of organizing tactics it uses in order to

gauge the union's operational priorities in terms of servicing existing members or organizing new members.

I interviewed Organizer 2 from Union 2 first. He has worked in the same union as an elected organizer for almost ten years, and has run uncontested for the past two terms. His father worked as an organizer for Union 2 as well, and now Organizer 2 represents some of the plants that his father helped organize fifty years ago. This began a pattern of family ties to unions that I would see repeated through most of my interviews. In short, Organizer 2's identity is strongly tied to Union 2, as well as this job. When asked to describe obstacles he has encountered in organizing, Organizer 2 became emotional and started to cry while detailing the struggle to keep workers, managers, and union employees working to improve situations. It was quite obvious that he has committed himself to this line of work regardless of the emotional strain it puts him under.

In order to gauge the level of involvement in the community of both the organizer and the union, I asked a series of questions about partnerships with other community organizations such as churches, community associations, or other union organizations. By forming these partnerships, the union places emphasis on a more grassroots, broadly based campaign. These coalitions often signify a willingness on the part of the union to recognize a larger campaign for social and economic justice, rather than solely being concerned about the status of workers in a particular plant or industry. The members of such coalitions may call on one another to help in organizing rallies, working with the media, providing services such as legal

assistance, or offering space for meetings. Therefore, I wanted to know about the commitment of the unions to these types of partnerships.

Organizer 2 is very involved in other organizations in his community and named more organizations than I could even write down. He mentioned at least six groups or projects that he actively participates in, in addition to his organizing responsibilities. He mentioned his excitement when John Sweeney was elected president of the AFL-CIO because Sweeney was committed to involving the labor movement in politics. However, when asked how much Union 2 was involved in such activities, he stated that it was modest at best. Union 2 feels that it's "up to the individual to get involved and get others involved".

As far as resources are concerned in local Union 2, he stated that the international has asked that thirty percent of the local's budget be spent on organizing efforts, as recommended by the AFL-CIO. The local encourages internal organizing, and offers a training program for members who wish to volunteer. I did not get the sense that money flowed as freely as in other locals, but he seemed pleased that many workers were interested in participating in a volunteer training seminar on organizing the unorganized. This level of involvement would obviously ease the strain on budgeting money for organizing efforts.

Next, I interviewed Organizer 1A. He has been employed as an organizer by several different union organizations. He has been at his present job at Union 1 for a few years, and works as a hired employee rather than in an elected position. Organizer 1A supervises three other organizers, two of whom I also interviewed. Through Organizer 1A's explanation of his career path, it seemed he felt he had

experienced a typical progression by moving from a volunteer organizer to an elected position to the hired position he currently holds, with different positions in different industries and in different unions. During the interview, Organizer 1A stated that when he was younger he had thought of becoming a preacher and that he saw his current work as an extension of that type of personality. His mother was involved in union activity, and encouraged him to be involved in any industry that offered union representation.

Union 1 has more resources in terms of money and paid organizers (four on staff) than the other two unions I studied, and Organizer 1A indicated that he mostly “gets what he wants” due to the success he has experienced in campaigns at this union. He enjoys a sense of autonomy, because his local president, Manager 1, allows him to work on campaigns of his choosing and mostly does not interfere with his work. Organizer 1A did not specify a percentage of his local’s budget that is allocated to organizing, but the local members of Union 1 did approve a dues increase to fund more organizing activity. This extra revenue helped to pay for the hiring of full-time organizing staff.

When asked about involvement in other community organizations, social justice campaigns, etc., Organizer 1A stated that he “used to do everything”, but he’s had a change in priorities. He stated that he now spends most of his free time with his family and at his church, responsibilities that he says he neglected during years of moving around on campaigns. However, he did state that local Union 1 really encourages members to participate in other community issues, and that they do at a fairly high rate. He mentioned the members’ involvement in a civil rights museum

and participation in the Jobs for Justice campaigns. Also, he believes that members of Union 1 participate more than at any other union he's been involved with and that they feel a sense of ownership of their local, along with a sense of militancy about their workplace. Organizer 1A was clearly very proud of both his accomplishments and those of the union and its membership.

Although these first two interviews offered me a wealth of information that was very useful as a starting point, I knew that I needed to find information that was more directly related to the differences between the resource mobilization and collective identity theories. As I stated before, I knew that all unions would have to balance organizing new members with servicing current members in order to be successful, but I thought that there would be more indicators of the unions' priorities than I had seen to this point. I decided to rework the interview process and focus more on the concepts that are central to each of these theories, rather than adhering to a list of questions.

I was also interested in diversifying my pool of respondents. Unfortunately, in North Carolina there is not a wealth of options in finding labor organizers. However, I did manage to interview organizers in a wide range of ages, males and females, and African-American and Caucasian individuals. Perhaps because of the difficulty of the task of organizing, these differences did not appear to influence the job of organizing in many ways; the difficulties of organizing shape the job. I asked each respondent how he or she thought personal characteristics affected their job performance or relationships with individuals they were attempting to organize. The only person who reported strong negative experiences was the female organizer,

Organizer 1C at Union 1. She had been harassed by male workers whom she was working to organize and had experienced individuals questioning her judgment because of her minority status as a female organizer. However, Organizer 1C seemed to view these experiences as challenges and stated that she had managed to change the opinions of those who had questioned her capabilities. She acknowledged that her occupation was male-dominated, and although she had felt intimidated in the past, her experiences had built up her confidence. Organizer 1C now feels capable of dealing with uncomfortable situations or comments but admitted that these problems still occur.

Organizer 1C and Organizer 1B had many similarities, including that they both work for Union 1. They were also much younger than the first two respondents, Organizer 2 and Organizer 1A. Both Organizer 1B and 1C had grown up in areas outside the South, where unions were much more common and accepted. Both had family ties to unions and accepted unions as a way of life. Organizers 1B and 1C worked for smaller social justice organizations during college and immediately afterwards. These organizations revolved around farm laborers' rights. For various reasons, they both ended up moving to North Carolina and joining the same union as hired organizers. I thought that these similarities in their backgrounds were very interesting, particularly because they both framed their experiences as part of a career ladder they were climbing.

Organizers 1B and 1C had initial labor movement experiences with small, under-funded organizations, and while they both stated that this work was meaningful and gave them a lot of experience, they needed to make a better living.

They pointed out to me that there is a great irony in the small amount of money they earned while trying to fight for better conditions for farm workers. These conditions drove them to a more secure, established organization such as Union 1. Union 1 has a very bureaucratic structure, and is considered a fairly traditional, business-model union. While they find their current work challenging, both plan to move into other positions either inside or outside the union at some point, where they will be able to make more money and have a less demanding schedule.

These comments from Organizers 1B and 1C suggested a more pragmatic view of the job of organizing. It was a job to them, not a calling or a life's work, but a job that required huge dedication and sacrifice. Although they had been involved with their current organization for less than five years, they had already made plans to move on to a better job in the future. They felt that they were good at organizing and that they had been successful in contributing to the organization. However, they did not seem as invested in the overall goals of the union as Organizer 1A, who hired them. Nor did this attitude reflect the collective identity theory's statements about participation in social movements. It more resembled a rational-choice model, as seen in resource mobilization theory. I was interested in finding out if this mentality about the organizers' careers was also present in how organizers often approached the workers who they were trying to organize.

Both Organizer 1B and 1C described how frustrated they were with the level of mistreatment that they saw workers endure, the levels of poverty that workers lived in, and the fear that had been instilled in them by anti-union management campaigns. They clearly felt that unionization was an important right, but that it

might only be a part of the solution to a huge problem. Organizer 1C pointed out to me that much of what workers faced were human rights issues, not simply attempts to get a pay raise. Many workers have died in North Carolina because of unsafe or hazardous working conditions, and Organizer 1C stated that unionization might have prevented some of these tragedies. Yet even though Organizers 1B and 1C acknowledged that overcoming these problems would require a massive effort, they did not work or volunteer with other community groups or organizations. Neither one felt that they had the time required for these partnerships, but they did say that they thought partnerships were a good idea.

A telling statement by one of the younger organizers, Organizer 1B, came when I asked about the necessary resources for doing the job. When asked what he would spend money on if he had more of it available, Organizer 1B stated that he would buy the latest technology for all of the office equipment. This surprised me for two reasons. First, when I had asked Organizer 1A, Organizer 1B's supervisor, about the importance of technology in doing his job, Organizer 1A had stated that it wasn't that useful because most of the workers whom they represent or try to organize do not have access to email, faxes, or other electronic communication. Therefore it seemed odd that Organizer 1B wanted to improve these technologies. Secondly, the workers are less likely to be aware of these investments in technology on their behalf, and I was surprised that Organizer 1B would want to spend more money on technology as opposed to hiring another paid organizer, or developing a volunteer-organizer training program, both of which would involve direct contact with workers. This is an issue of priorities, and I thought that this example showed that

Organizer 1B's priorities were focused on improving the work environment of Union 1, rather than on expanding and addressing the labor movement as a whole.

To this point, I had interviewed organizers from Unions 1 and 2 and workers from Unions 2 and 3. While there were small differences between these groups, I had not had any respondents who clearly exemplified the theoretical propositions of the collective identity theory. All of these individuals had included some of the theoretical concepts in their comments, but these ideas did not seem to be the primary motivation in either organizing or joining. The resource mobilization theory had been represented much more clearly in the respondents' comments to this point.

My next interview was with Organizer 3 from Union 3, a union that had been described to me as more socially progressive and non-traditional. There are reasons for these generalizations. Union 3 does not have a traditional management structure. Members essentially control the union and elect officers from within to help run the union. Union 3 is known for partnering with many other community groups in order to expand the union's campaigns. Also, Union 3 has much more limited funding and other resources than Unions 1 and 2.

My interview with Organizer 3 was rather non-traditional as well. My previous interviews had been fairly business-like meetings. I tried to be efficient, punctual, prepared, and to not reveal too much information about what I was really interested in, and for the first interviews the respondents did not engage me in "casual" conversation or ask me my personal opinions. All of this was much harder to achieve with Organizer 3. I have to assume that this is a function of two things: first,

the lack of resources forced Organizer 3 to multi-task during our interview, because he simply didn't have the time to do only one thing; and second, his personality and his occupation are so enmeshed that he is effectively doing his job all of the time. He was trying to organize people in all situations, even trying to organize me during the interview. This made it a bit more difficult to remain impartial, but I tried to let Organizer 3 lead the questioning and answering.

It was clear from the beginning that Organizer 3's ideas and mission differed dramatically from the people I had interviewed before. He spoke directly about improving the economic situation for all workers, the need for the labor movement to work together to organize more workers, to revolt against capitalism, and to form a broad-based movement through partnerships with community groups, social justice organizations, churches, and essentially anyone else who was willing to join – including graduate students working on thesis research. Organizer 3 had been hired from outside the labor movement and had worked as an activist in other movements. It was clear that he was well educated, well spoken, and passionate about his job. He was animated and excited when speaking, even though he was preparing handout literature at the same time.

Organizer 3 explained to me that while Union 3 lacked many resources, it had been able to partner effectively with other community groups in order to fill the voids. These other groups then called on Union 3 and its membership whenever they needed backing for their demonstrations or other support in the media. In this way, Union 3 had been able to gather research, have legal support, and a wider base of assistance without having to spend the resources. He also said that it would have

been impossible for Union 3 to make the gains that it has without this support system. He maintained that solidarity would be the “salvation” of the labor movement, but that it meant that unions would have to look outside themselves and form coalitions in order to gain ground. Union 3 has set out certain goals for campaigns each year for the past several years, and by prioritizing its resources and partnering with other groups these yearly campaigns have been growing.

I was thrilled with this line of conversation, although I tried not to reveal it as I attempted to stay neutral during my interviews. He was offering the contrast that I knew was out there from reading the literature but that I had been unable to find until this point. Organizer 3 was supporting every idea of the collective identity theory, while everyone else I had interviewed seemed to place priority on resources and selective incentives, both for themselves and their memberships. However, all of this changed when some members of Union 3 arrived at our meeting.

While Organizer 3 had mentioned to me that some members might be stopping by, I had not realized that he had planned to hold a member meeting at the restaurant where we were talking. I tried to be unobtrusive when the members arrived, but Organizer 3 introduced me and gave the workers some details about my project and they began to include me in their discussion. There were also some individuals there who were considering joining Union 3. I decided to stay and observe what would turn out to be a dramatically different meeting than what I had assumed it would be after my previous discussion with Organizer 3.

The conversation between Organizer 3 and the workers focused on pay raises and supervisor treatment, which surprised me in light of the social justice-

focus of Organizer 3's interview responses. Since it was the workers who raised these concerns, it seemed appropriate for Organizer 3 to address them. What I found more interesting was that Organizer 3's body language and way of speaking changed when he began the meeting with the workers. While his conversation with me had been more straightforward than I assume he typically is with workers, I had not expected him to change these mannerisms. He began to speak more in a Southern accent, more casually, using slang, and not enunciating his words. I am not sure that I would have noticed it, except for the fact that he had been speaking differently to me only minutes before. Combining these changes with the topics of conversation really made me question my impression of Organizer 3. It was as though he was putting on an act for the workers, or else he had been putting on an act for me.

I understand that all people change certain traits depending on the audience, but in this situation I was in the audience both before and after the workers arrived, and I found the changes disconcerting. I was also struck by the fact that all of the workers Organizer 3 was addressing were African-American, and I could not help but wonder if he thought these "down-home" mannerisms would be more effective in this group. In any case, I was puzzled by the changes. This led me to begin to question how "real" any of my respondents had been with me. I am not suggesting that these acts discredit the organizers or the work that they do, but merely acknowledging that organizers, like everyone in interactions with others, present themselves with their audience in mind.

Organizer 3 discussed expanding the union campaign with these workers and tried to find out who could be trusted among the unorganized employees at the work site. The names and shifts of supervisors were gathered, as well as employees who were favored by these supervisors. He wrote down all of this information, but I was not sure of its purpose. He then passed out the materials that he had collated during our previous conversation. The members were asked to try to recruit other co-workers and to attend a rally in the next few days. He wanted to take the workers' picture for some flyers, and he had them put on their union pins and hold up their arms with their fists clenched in a "power" pose. I cannot say that I thought the workers looked particularly enthusiastic in the pose.

I left that meeting with a bit of confusion as to what had happened. Although it had started out going exactly the direction that I wanted it to, the meeting had ended up with a completely different feel. Instead of maintaining his attitude of solidarity, participation, and social and economic justice, Organizer 3 had changed his tune when directly addressing workers. As with the other respondents before him, it was not one social movement theory over the other, but a combination of the two theories that seemed to hold true. My previous respondents had started with the discussion of selective incentives, and then had talked about solidarity and justice in abstract terms. This respondent talked about solidarity first, and incentives second. The general conclusion is the same: workers are being approached and convinced to join unions using selective incentives, but they are convinced to be active members because of solidarity and ties. Neither theory effectively explains actual

participation by itself; rather this idea of sequential blending seems better to convey the process of organizing in North Carolina.

In order to get a clear sense of the priorities of Unions 1, 2, and 3, I wanted to talk to some members of union management who were not responsible for organizing. I expected these individuals to reflect the ideas of the organizers in terms of the allocation of resources, the participation of members in the union, and the importance of creating a sense of solidarity among the members. I expected the business-model union manager to establish the union's direction and dedication of resources, while I expected the more progressive union manager to emphasize collective participation and decision-making in terms of the union's priorities.

Union Management

In order to have a cohesive plan for an organization, all levels of participants must be operating with the same mission, strategies, and desired outcomes. This holds true for labor unions, as well. My hypothesis was that union management employees would express similar ideas as the organizers in their union, whether this meant that there was a strong or weak emphasis on organizing. In order to assess this hypothesis, I asked members of union management mostly the same questions I had asked the organizers. Once again, I was looking for statements that might reflect the important concepts of either resource mobilization or collective identity theory. Although I could not interview individuals in all departments of the union organizations, I did speak with individuals who were leaders in Union 1 and Union 3. I contacted Manager 1 and Manager 3 after having spoken with organizers in their

respective unions. I explained that these organizers had participated in my research project and that I would appreciate their input as managers. The management members were less accessible than the organizers, but I was able to meet with the local president of Union 1, Manager 1, and a regional supervisor of Union 3, Manager 3.

The first individual I interviewed, Manager 1, is the president of a large local in North Carolina, Union 1. He has held this position, along with others of importance in the same union, for several years. He rose up through the ranks of Union 1, beginning as a worker in a plant. Through various elected and hired positions, including being an organizer, he ended up at this high-ranking level. When I told him that I had wanted to speak with members of union management, he corrected me by saying “union leadership”. This distinction was very important to him. The international branch of Union 1 offers a lot of autonomy to the locals, and Manager 1 has used his influence to hire four full-time organizers, three of whom I had interviewed. This is the largest organizing staff in the unions in this research. The allocation of resources to organizing in local Union 1 suggested to me that organizing is seen there as very important.

Having been a member of this union for most of his adult life, Manager 1 is very loyal to the organization. He is proud of his accomplishments and is satisfied with Union 1’s development in the region. I asked him about the importance of organizing for unions, and he stated that organizing is the “lifeblood” of unions. Without the development of the membership through the recruitment of new members, the organization will not survive. When asked about achieving a balance

between organizing new members and servicing the current membership, Manager 1 stated that his members were aware of the need for organizing. The members had supported his decision to use the revenue from a dues increase to create the organizing department that Union 1 now has. This show of support from the members made it easier for him as the president to steer the local in that direction. He also pointed out that there were clearly defined employee roles corresponding to different aspects of the union. Specifically, organizers and business agents have distinct positions. This allows Union 1 to negotiate the balance between organizing new members and servicing current members more effectively, according to Manager 1.

Although he stated that he could always use more money for organizing efforts, Manager 1 is pleased with the resources that have been allocated and with the way the organizing staff has made use of these resources. He acknowledged that North Carolina is a difficult state to expand in, due to the right-to-work laws and a general lack of knowledge about unionism. However, he stated that these problems were the very reason that Union 1's efforts should be concentrated in this state. The low union density in North Carolina makes it the prime target for unionization campaigns, although the organizers must first overcome the challenge of educating workers on the purpose and benefits of unionization.

When asked about the importance of partnering with other activist groups in the community, Manager 1 stated that he thought it was very important. He said that his local had partnered with local churches and community groups in the past during campaigns, and the union members were often also members of these partnering

organizations. However, when asked about specific partnerships, only one was named and it was not currently active. This may be due to the large amount of resources that this union already possesses as opposed to the other unions included in this research, or it might be due to a lack of encouragement from union management to members to participate in these partnerships. Manager 1's description seemed similar to the one given by Organizer 1A, who had stated that he encouraged the members to be active in other organizations but that he was not personally.

Although local Union 1 has dedicated significant resources to organizing by hiring four full-time organizers, the bureaucratic organizational structure of the union and the lack of effective partnerships do not reflect the appearance of a grassroots effort as described by the collective identity theory. However, this union has been able to make significant gains in membership by using its traditional tactics, top-down management style, and impressive resources. Therefore, in this case the conservative approach of Union 1 seems to be at least as effective as the broad-based approach of Union 3 in appealing to unorganized workers.

The second member of union management whom I spoke with was Manager 3, of Union 3, the more progressive union. Manager 3 is in a supervisory position, overseeing field organizers in the Eastern region of the international. He has been working for Union 3 for over a decade, beginning as a field organizer. Manager 3 shared many of the same concerns as Organizer 3. In particular, he pointed out the necessity of Union 3's partnerships with other community organizations in order to build support. He also stated that he thought union campaigns were frequently too

short and did not give organizers enough time to develop relationships with workers. Organizers seemed too pressured to make progress on the campaign, and did not always listen to the worker's concerns. Relying on a "one-size-fits-all" type of organizing strategy led organizers to ignore the relationships and actions that the workers had already achieved.

Manager 3 also spoke a lot about resources. Organizing is expensive, particularly for a union, such as his, that is much smaller than the others included in this research. Manager 3 stated that Union 3 has had to reprioritize its efforts and concentrate on particular areas, rather than scouting out many potential organizing campaigns in different locations. However, he did point out that this does not mean that Union 3 has revised its overall goals of social justice, but that it must be selective in how the campaigns are run.

Union 3 strongly encourages its members to participate in organizing efforts, and Manager 3 seemed pleased by the level of participation. However, he did point out that the main times that members were active were during contract negotiations or periods of crisis. He also stated that Union 3 needed to develop a stronger orientation program for new members, so that they might feel more included in union activities and participate more frequently.

I was interested to hear Manager 3's comments because I had been so surprised by my experience with Organizer 3 and his membership meeting. I did not specifically state what had happened during that meeting to Manager 3. However, Manager 3 explained that one of the reasons that he wished that union campaigns could develop over longer periods of time was that it would allow time to build trust

among workers and organizers. He was concerned with the levels of sexism and racism that are still present in the workplace and that these issues lead to distrust among workers. Organizers are forced to make assumptions about what campaigns need and how workers interact, but this can be counterproductive in the organizing process. Perhaps Organizer 3 assumed that the group of workers would respond to him in a negative way if he spoke to them in the same way that he had spoken to me, and therefore he changed his behavior to reflect what he thought they would respond to more positively.

The two union management employees I spoke with basically seemed to reflect the same opinions as the organizers in their unions. Although individuals in management positions must be concerned with all aspects of the union, both Manager 1 and Manager 3 seemed to appreciate the importance of organizing and the significant resources that it takes to run successful campaigns. However, Manager 3 seemed to be more concerned about building coalitions with other groups and running broad-based campaigns than Manager 1. This is in line with Union 3's mission as a grassroots organization, while Union 1 has a more traditional structure and greater resources.

ANALYSIS

In this section, I look for patterns in the interviews that show the extent to which the resource mobilization theory and collective identity theory are applicable to unions in North Carolina. Although the sample for this research is small, the workers, organizers, and union managers who participated offer insight into what is really important in union organizing and getting individuals to join a social movement. The patterns in the individuals' responses suggest which concepts from these two theories are actually important in the real world of North Carolina unions. These patterns are depicted in Table 2.

Table 2. Summaries of interview responses on key concepts.

	Organization Structure	Resources	Selective Incentives	Solidarity	Social Networks
Union 1	Traditional*	Most	More important	Less important	Less important
Manager 1	Traditional	Most	More important	Important	Important
Organizer 1A	Traditional	Most	More important	Important	Important
Organizer 1B	Traditional	Most	Important	Important	Important
Organizer 1C	Traditional	Most	Important	Important	Important
Union 2	Traditional	Medium	Important	Important	Important
Organizer 2	Traditional	Medium	Important	Important	More important
Workers 2	Traditional	Medium	Important	More important**	More important
Union 3	Progressive	Least	Important	More important	More important
Manager 3	Progressive	Least	Important	More important	More important
Organizer 3	Progressive	Least	Important	More important	Important
Workers 3	Traditional	Least	More important	Important	Important

*Cell entries in union rows compare that union with the other two unions.

**Surprising responses, given others for that union, are bolded.

Table 2 shows the responses of each respondent when asked several questions that are central to concepts in resource mobilization theory and collective identity theory. Cell entries give two kinds of information: an absolute level and a

level relative to other responses in that column. Respondents were asked to describe the organizational structure of their union. In particular, respondents were asked if there were typical career paths for union employees, did union leaders tend to come up through the ranks of the union, and whether or not organizers were hired or elected. The column labeled “organization structure” shows the respondents’ answers as either traditional or progressive. Traditional unions are typified by having a top-down organizational style, a bureaucratic structure, and less emphasis on grassroots organizing. Progressive unions are typified by a bottom-up organizational style, a broad-based support system including organizations outside of the labor movement, and a greater emphasis on grassroots organizing.

Respondents were asked about the level of resources that their union devoted to organizing. The respondents were also asked to estimate their union’s resources in comparison with other unions in North Carolina, and so the responses include a range from the most resources to the least resources.

Respondents were questioned about the importance of selective incentives. Specifically, which incentives were most important to workers, how were these incentives presented, and would workers join without the promise of these incentives. These three particular items were especially important in determining if each union was more focused on gaining resources and recruiting members using the rational choice methods of the resource mobilization theory.

Table 2 also includes two elements that are central to collective identity theory. Respondents were asked questions about creating and maintaining solidarity among workers, as well as about the importance of social networks in

recruiting new members. These answers indicated the union's emphasis on elements closely associated with the collective identity theory. However, it is important to note that most of the organizers and managers were from areas where unionization is much more common than it is in North Carolina, therefore their use of social networks would be considerably different than the workers living in North Carolina.

A key pattern in the responses was that all of these elements were important in union organizing, regardless of the structure of the union. Each union depends on both resources and social networks. Each union approaches workers with more emphasis on incentives than on solidarity. However, each union faced challenges in balancing its resources between servicing current members and recruiting new members. Through the interview questioning, the priorities of each union became clearer and this led to the distinctions shown in Table 2. At the same time that all three unions included elements from both theories in their approaches, the more traditional union's members did tend to emphasize elements of the resource mobilization theory, and the more progressive union's members did emphasize elements from the collective identity theory more strongly.

The main surprises in Table 2 came in the conversations with the groups of workers. Workers 2 seemed to place more emphasis on the importance of solidarity and social networks than the rest of the information from Union 2 would have predicted. Union 2 was depicted as a fairly traditional union, but the workers participating in the volunteer organizing workshop clearly understood the need for a bottom-up style of organizing. Also, both the workers and Organizer 2 had family

ties or other social ties that made union participation more of a social expectation than a work strategy. The respondents expressed connection to the union as a responsibility and a privilege.

On the other hand, Workers 3 placed more emphasis on the material benefits of unionization. Their main interest was in obtaining selective incentives, including the removal of negative reviews from their employee files so that they would remain eligible for pay increases. This was surprising because most of these workers were members of a union that has a reputation for radical grassroots action, as both Manager 3 and Organizer 3 stated. Also, the workers' relationship with Organizer 3 seemed to be an unequal one, rather than a collaborative effort. The workers placed responsibility for improving their situation on Organizer 3 and the union, rather than actively participating in the union's involvement. Organizer 3's behavior during the discussion with the workers may have encouraged this distancing. These types of discrepancies are interesting because they show that unions face great challenges in aligning the interests of management, organizers, and workers when trying to organize new members.

During the data collection, I began to see some repetition in the answers of my respondents. Elements of both social movement theories were present in the responses of everyone I spoke with, but the priorities were evident in how the organizers discussed their meetings with unorganized workers. Initially, appeals are made to the workers about their working conditions, their pay and benefits, and their job security. These issues seem to be at the forefront of every organizer's mind and address the immediate concerns of the workers. If the organizers are successful

and the workers join the union, then attempts are made to foster some relationships among the organized workers and develop a sense of solidarity among members, or the working class as a whole.

All of the organizers and workers, as well as the Manager of Union 1, described this pattern in organizing. However, none of the respondents had claimed explicitly that this pattern worked when asked how they typically began an organizing effort; it was just presented as the way these particular workers were approached by these particular organizers. Manager 3 of Union 3 was adamant that workers must be unified in order for organizing efforts to be successful, but he also acknowledged the importance of selective incentives in campaigns. Table 3 shows how each respondent acknowledged the importance of this sequence in organizing. It clearly shows that almost all of the respondents found that offering unorganized workers selective incentives first was more common than either cultivating solidarity among workers before introducing selective incentives or offering incentives and cultivating solidarity at the same time.

Table 3. Sequencing of incentives and solidarity according to each interview

	Incentives before solidarity	Solidarity before incentives	Incentives and solidarity simultaneously	No explanation of sequencing
Union 1				
Manager 1	X			
Organizer 1A	X			
Organizer 1B	X			
Organizer 1C	X			
Union 2				
Organizer 2	X			
Workers 2	X			
Union 3				
Manager 3			X	
Organizer 3	X			
Workers 3	X			

This pattern offers a suggestion as to how social movement theories might be revised. There appears to be a sequence of events that may lead to more successful organizing and retention of members. This sequencing process acknowledges the importance of both resources and selective incentives at the initial stages of approaching and recruiting new members, but relies on the development of solidarity and close social ties after workers join in order to create a bonded group that successfully retains members and encourages members' active participation. This revised theory blends resource mobilization theory and collective identity theory through an attention to time sequencing.

I think this blended theory makes sense. Given limitations in their resources and power, labor unions would be hard pressed to continue to offer the selective incentives that would be necessary to maintain the organized membership while offering even more incentives to have new members sign on. It would be more reasonable to focus those selective incentives on benefiting new members, then to instill a sense of responsibility and commitment into them quickly so that the material incentives are no longer what holds the organization together. For example, Workers 2 included two young men who had only recently joined the union, and yet they were already participating in volunteer organizer training. These young men had realized that the only way that they would continue to see benefits from joining the union would be if they could convince many more workers in the industry to participate, too. Union 2 had done an effective job of explaining this connection to its members, rather than trying to convince them that members could receive pay raises every year in exchange for just paying dues.

It is also important to remember that these interviews took place in North Carolina, an extremely restricted state in terms of unionization. Almost all of the respondents noted the lack of knowledge about unions and how difficult it was for organizers to get past that barrier to even discuss unionization with workers. This type of hostile environment means that organizers must be strategic in how workers are approached. If workers know anything about unions, it appears that they know that labor unions work to improve wages and benefits. Organizers maximize this one opportunity to approach workers by offering these incentives. Trying to approach workers who have never been exposed to unions through discussing solidarity and the importance of fighting for social justice would be difficult. There is no relationship between these workers and unions. In areas of the country where unions are more commonplace, such as the Northeast, workers might have more of a working knowledge to understand the connection between their participation and a larger cause. Appealing to workers based on their sense of solidarity and close ties to others involved in unions, while simultaneously offering selective incentives, may be an effective strategy in a high union density area. In North Carolina, however, there is too much isolation from other union members to have that expectation.

CONCLUSIONS

I began this research with the question “what makes people join social movements?” Two theories that have attempted to answer this question are the resource mobilization theory and the collective identity theory. While the resource mobilization theory includes concepts of rational choice and selective incentives, as well as finding strategic opportunities, the collective identity theory focuses more on developing a sense of solidarity and cohesiveness within a group through social ties. My goal was to apply these theories to the labor movement in North Carolina. The findings from this research are limited due to the small size of the sample, and therefore it is difficult to generalize the results. However, this research may still offer unions in North Carolina some useful information, as well as offer a more complete explanation for why individuals choose to participate in social movements such as the labor movement and how appeals to join might be most effectively made. The field of social movement theory has seen developments that reflect refinements of previous theories as well.

The labor movement has seen significant declines in density for the past several decades. In order to revitalize the movement, AFL-CIO President John Sweeney asked union leaders to recommit to organizing new members by devoting significant resources to the effort. This led to the emphasis on less commonly utilized methods of organizing, including more grassroots efforts and development of worker solidarity. Elements of the resource mobilization theory and the collective identity theory were evident in this proposed effort. I decided to use the statements

of workers, organizers, and union management to determine which, if either, theory was a more accurate depiction of how individuals join unions in this state.

Through interviews with workers, organizers, and union managers, I was able to collect information about opinions, career paths, expectations, and experiences of individuals involved with the labor movement. Not all of the information was what I had expected to hear. I hypothesized that elements of both theories would be present in all labor unions but that individual unions would lean towards one method of organizing over the other. The responses suggest that this is true. Both methods, the bureaucratic model and the grassroots model, are deployed, even in the hostile climate of North Carolina. The unions I used for comparison were extremely different in terms of their resources, organizing approach, and organizational structure. However, individuals at all levels of the union expressed satisfaction with their organizations, regardless of the number of successful campaigns that the union had organized.

My interviews suggest that an integration of resource mobilization theory and collective identity theory would most accurately capture the experiences of individuals involved in the labor movement. This blended theory would include the use of selective incentives, the availability of resources, the development of solidarity, and the importance of social ties. It appears that North Carolina workers are most interested in the selective incentives prior to joining the union. These are immediate issues, such as wages and benefits, which organizers can address with both the workers and management. These issues are important, particularly because they are the issues typically associated with unions. In an atmosphere

such as the one that exists in North Carolina, fear and lack of knowledge about how unions operate must be overcome in order to convince workers to become involved. Addressing these basic issues is an effective way to recruit new members. In order to campaign effectively, certain resources must be available, such as time, money for supplies, legal assistance, and plenty of attention from the campaign organizer. By utilizing these resources, as well as initially presenting selective incentives, organizers can more effectively encourage workers to join unions.

Once workers join the union, they must be retained. Members must begin to feel that their membership in the union is central to who they are as people. They must also feel a commitment to the union and a sense of solidarity with the other members. However, member retention multiplies its effect if the members themselves begin recruiting additional members. In order to encourage this volunteer participation, unions should work to foster a sense of loyalty to the organization and an expectation of this type of behavior. The union should also work in collaboration with other community organizations that share similar goals. This helps to increase the network of social ties for the union, as well as to create a sense of interdependency throughout the community. Once an individual's union, church, and neighborhood association are working together on an issue, it would be much more difficult for that individual not to participate in the effort. These collaborations also lend themselves to recruiting new union members as well as solidifying the relationships among current members.

Social movement literature offers support for this idea of incorporating elements from both resource mobilization theory and collective identity theory.

These theories serve as starting points in considering participation in social movements. Mueller (1992) states,

“The building blocks of resource mobilization - resources, formal organizations, tactics, and political opportunities – are not ignored, but rather reframed within a broader paradigm that is at once more sensitive to historical, cultural, and structural differences between groups seeking to mobilize on behalf of collective ends and more attuned to the micromobilization context in which social movement identities and grievances are forged out of specific experiences of constraint and opportunity” (p. 22).

Resources and identities are important to consider when determining causes for participation, as it is neither solely a rational-choice decision nor one based on feelings of solidarity. Incorporating the importance of collective identity into the resource mobilization perspective allows for a broader view of the mobilization process (e.g., Gamson 1992, Klandermans 1992). Research has also offered suggestions as to how to retain social movement participants more effectively and to encourage active participation among members (Barkan et al. 1995) and offers the finding that the same variables that predict joining behavior, such as solidarity, incentives, and ideological variables, also predict the level of participation after joining. These developments reflect the importance I have placed on organizers addressing workers in North Carolina with the correct sequence of appeals.

The context of organizing may significantly shape incentives' and identities' impact on organizing. In North Carolina, very low union density is of fundamental importance, and it affects many aspects of organizing in the state. Perhaps most importantly, as I have already shown, the identity of union member or labor activist is rarely inherited or socialized in North Carolina but must be introduced in the process of organizing or mobilizing. In addition, organizers are forced to change the strategies and tactics that are effective in other areas of the country, but are

ineffective in such a dispersed population of union members. Strategies that rely on regular contact between union members and targets of organizing are irrelevant. With little past successful local union organizing experience, unions in North Carolina have few models to emulate. However, employers have many models of successful union resistance available to them.

Low union density also implies few union locals; union organizations do not add up to a union “industry” (in the language of resource mobilization theory), and, therefore, unions cannot yet be said to constitute a social movement in North Carolina. This means both that it is harder for unions to form coalitions and otherwise compete with one another in North Carolina than in areas with higher density of union organization, but also that unions in North Carolina are unlikely to compete with one another for members. There are plenty of unorganized workers to “go around”. Low union density has another potential advantage, ironically. In areas with higher union density, the easiest workers and workplaces to organizer may already have been “used up”. In North Carolina the best organizing targets are still available. Of course, organizers have a hard time taking advantage of all these available unorganized workers given the many other burdens that come with low union density.

Still, there are useful lessons in this research. By incorporating elements of the resource mobilization theory and the collective identity theory, a more complete theory of social movement participation could be advanced. In the same way, by blending the organizing styles of the unions that I studied, a more effective organizing approach may be achieved. There is no question that changes need to

be made if the labor movement is going to continue, much less grow, in the United States. The economic sectors that are targeted must be expanded, the tactics that are used must be developed strategically, and the retention and participation of current members is essential. This process may work more effectively by thinking of organizing as a long-term process. The issues that matter to workers when they are being recruited may not be the same once they are union members. Workers, once recruited, must then be mobilized to think of unionism as part of their identity and to think that active participation is required of them. In order to rebound from decades of declining union density, unions must be willing to adapt their organizing strategies to address the needs of unorganized workers in today's labor markets and workplaces, as well as to support the current members of their organizations.

INTERVIEW QUESTIONS

Questions about the Organizer's experiences

- Describe your career experience within your organization including previous positions, length of employment, future expectations, etc.
- Describe the organizing tactics that you use in a typical campaign. Have these tactics changed since you began working as an organizer? Describe why these changes took place. How do these tactics have to fit the industry being organized? How do tactics have to be adapted to the current situation?
- To what extent is your job as an organizer what you expected it to be? Would you elaborate on aspects of the job or the union that you would change if given the opportunity?
- What have you found to be the most critical aspects of the organizer's job? Can you give an example?
- What have you found to be an organizer's budget problems? Can you give an example?
- Do you feel your organizing responsibilities in this particular union are similar to what you would experience in other unions? Why or why not?
- What are you trying most of all to accomplish in organizing?
- Are you involved in any other social justice organizations or organizations that are concerned with social welfare? If so, do you think that there are connections between your union work and these other organizations? Please describe any efforts that have involved multiple organizations, including your union.
- What have you found to be the greatest obstacle to successful organizing?

Questions about the Union

- Describe the organization of your union. How do people become employees of your union? Are there career ladders, and, if so, are they adhered to?
- For your union, what is the goal of organizing? How does organizing compare with other union goals? How are these goals shared with prospective members? Have these goals been revised? If so, in what ways and under what conditions?

- Generally speaking, how are resources (money, materials, labor) allocated within your union? Have the allocations for organizing expenses changed since your involvement began with this organization? If so, in what ways and under what conditions?
- What makes a union campaign successful or unsuccessful? How many successful campaigns has your union been involved with since you began working as an organizer? How many unsuccessful campaigns has your union been involved with since you began working as an organizer? What were these experiences like? How did the people in the union react? Describe any feedback provided by the international union involving the success rate of campaigns.
- Do you see your union as part of a larger campaign for social justice or would you say its primary interest is bettering its own members? Is your union involved with any other organizations in your community? Would you like to see these types of efforts broadened, or would you prefer to concentrate solely on labor issues?

Questions about Workers

- To what extent are rank-and-file workers encouraged to participate in your union? If so, what roles do workers play in the organization?
- Is there any sort of orientation period or mentoring for new members of the union? If so, would you describe these activities? How long to new workers tend to wait before becoming active in the union organization?
- What expectations does your union have for worker participation in the union? What percentages of your union's members are very active, somewhat active, or largely inactive? Do you see these percentages as largely satisfactory or largely unsatisfactory? Why?
- What steps, if any, does your union take to get more members to participate actively? Do these efforts work? Why do you think these efforts do or don't work?
- How do new and veteran union members interact in your union?

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