

Section 7 – SPEEA/Boeing Partnership

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Why Partner

When relationships between SPEEA members and their local management work, people understand their responsibilities, have the tools and training they need, and perform well in an environment supportive of their career aspirations. In these circumstances, both individuals and organizations can succeed.

These conditions don't happen by themselves: they require the involvement of people in the decisions that affect them. Working alone, even the best managers need the contributions of SPEEA-represented employees to make good decisions and to implement them fairly and effectively. Similarly, employees need a safe environment where they can contribute their ideas and energy to enhance quality, productivity, job satisfaction, and career development.

When SPEEA, management, and SPEEA members work together, they are capable of accomplishing much more than any of them could alone. **As Council Representatives, you can help set the stage for this collaboration by:**

- validating and giving visibility to employee concerns
- supporting a mutual dialogue free of the obstacles often present in the normal chain of command
- identifying and applying the assets that SPEEA, its members, and management can each contribute to their mutual success

Many of the factors that contribute to positive work environments are local and specific in nature. What can successful local SPEEA/Boeing partnerships contribute?

- Better working relationships between SPEEA, its members, and management (including Human Resources)
- Enhanced appreciation of SPEEA's role as constructive, joint problem-solvers
- Advance discussion of issues and concerns before they become "problems"
- Greater recognition of SPEEA members' contribution to organizational success
- More effective communication between management, SPEEA, and its members
- Higher priority for SPEEA members' needs and concerns
- Meaningful involvement of SPEEA members in decisions that affect them
- Effective resolution of issues before invoking the grievance/arbitration process
- Mutual commitment to the success of both employees and their organizations
- Enhanced quality, productivity, job satisfaction and career development
- Sustainable, non-adversarial processes for identifying and addressing issues of mutual interest and benefit

What other possibilities would you add to the list?

Labor-management partnerships don't mature in a linear fashion. Even the most successful partnerships experience periods of achievement and growth, disappointment and discouragement, and stagnation. These may be cyclical or the result of specific factors peculiar to an individual partnership. In either case, the histories of individual partnerships indicate a lot of trial and error. The most successful partnerships are the ones where participants understand this and embrace the attitude that when something doesn't work, they can try something else.

Partnership Milestones

Long before the word “partnership” appeared in any official documents, SPEEA and management representatives collaborated on issues of mutual interest and benefit. Here are some examples of those efforts:

- **1992** After two years of work by the Performance Management Task Team, comprised of SPEEA members, staff, and management representatives, Work Performance Review was superseded by Performance Management in Attachment #9 of the Puget Sound contracts.
- **1995** Through a collaborative effort called SPEEA Tech Job Redesign (STJR) spanning several years, SPEEA members, staff, and people from both management and non-represented pay codes replaced outdated SPEEA Tech job descriptions and classifications, culminating in multiple changes to the Puget Sound Tech contract.
- **1995** Following eighteen months of review and revision by SPEEA members, staff, and management representatives, new language for Performance Management became Article 4 of the SPEEA/Boeing Puget Sound contracts.
- **1995** Article 20 of the Puget Sound contracts created a joint SPEEA/Boeing program, initially called the Institute for Technical Excellence and Application (ITEA), to enhance the education, training, career development and utilization of the SPEEA-represented workforce.
- **1996** The Everett Roundtable was formed to provide a venue for SPEEA and management to discuss issues of mutual concern affecting the Everett site.
- **1998** The Ed Wells Initiative (formerly ITEA), a SPEEA/Boeing joint program, was added to the Wichita Engineers contract by letter of understanding.

After the 40-day SPEEA strike in 2000, many from both SPEEA and management felt that regular communication and collaboration on issues of mutual interest was needed to build and maintain good relationships between management, SPEEA, and represented employees:

- **2000** SPEEA and Boeing agreed to a series of high-level meetings between IFPTE leadership and the Boeing CEO called the “Working Together Partnership” in the 1999 Puget Sound contracts, Attachment #31. At the same time, SPEEA and Boeing leaders in Puget Sound began to meet regularly to discuss issues of mutual concern.
- **2000** A SPEEA/Boeing Joint Oversight Committee was included in the 1999 Wichita Engineers contract, Attachment #11.
- **2000** The Facilities Partnership Team was formed to enhance relationships between employees and management through regular meetings and open discussions of SPEEA and Facilities issues.
- **2001** Following the successful model of the Facilities Partnership Team, the SHEASPEEA Team was launched to enhance relationships between employees and management through regular meetings and open discussions of SPEEA and SHEA issues.
- **2001** The Metrology Workload Split Committee formed with representatives SPEEA, Management, and IAM #751 to assure that Metrology work throughout Puget Sound is appropriately assigned between the Engineering and Production

organizations.

- **2002** CAS Partnership Teams were established to develop the relationship between SPEEA and Management by providing opportunities for early involvement and building trust.
- **2002** The SPEEA-Boeing Partnership was added to Article 20 of the Puget Sound contracts, providing funding and staff to support partnership efforts.
- **2003** After ratification of the 2002 contracts, the Partnership Leadership Team was formed to include SPEEA and Boeing leaders from Puget Sound and Wichita.
- **2004** The Renton Partnership Forum established a collaborative forum for sharing information, have open dialogue about issues, and build relationships so that they can understand and address issues before they become problems.
- **2005** The Integrated Defense Systems/Phantom Works Puget Sound SPEEA-Boeing Partnership was established in 2005 to create an environment that enables working together for mutual benefit and the application of technical excellence.
- **2006** through 2012 - Council Rep/Human Resource Generalist forums held in Renton, Everett, CAS and BDS.

The purpose of the forums is to bring together Human Resource Generalists and SPEEA Council Representatives to enhance their ability to resolve issues collaboratively in the workplace. There were presentations by both SPEEA and HR and time to meet together to

- Increase appreciation of each other's perspective and roles and responsibilities
 - Begin to establish good working relationships
 - Discuss what collaborative resolution of workplace issues would look like
- **2008, 2010 and 2012** – Regional Partnership Forum

The Ed Wells Partnership began offering an event to bring together the participants of all the Site Partnership teams at one time. The purpose of these events is to strengthen the ability to understand differing perspectives and collaborate to address topics of mutual interest by:

- Sharing best practices in solving workplace challenges
 - Strengthening relationships among SPEEA, Management/Executives and HRGs
 - Gaining partnership skills
- **2009** – The Joint Partnership Council was established to bring together SPEEA, HR and management representatives from each of the Site Partnership teams periodically to share best practices and network across partnership teams.

Working Definition

Labor-management partnerships can and have taken different forms, pursued different goals, achieved different ends. Though it's important for participants in specific partnerships to share interests and goals, it's not necessary for everyone involved to agree on a single definition of **partnership in general**. For people who are trying to get their minds around the concept and grasp how it's different from what they usually experience in their relationships with their union or management counterparts, it's sometimes helpful to have some kind of working definition or mental model that they can test, validate, and improve based on their actual experience.

- Looking at some well-known labor-management partnerships, such as the Kaiser Permanente Labor Management Partnership
- Harley-Davidson, IAM, and PACE
- Boeing Philadelphia and UAW

Some features stand out that might constitute a working definition of labor-management partnership:

“Representatives from management, the union, and represented employees working together voluntarily on issues of mutual interest for their mutual benefit.”

The elements of this definition each imply something important at a very high level about:

- why are you there?
- who else needs to be there?
- what will you do together?
- how will you interact with each other?

Obviously, such a definition isn't a procedure for establishing an effective labor-management partnership. As mentioned above, there is a tremendous variability in approaches to partnership, even among the most successful ones. It does, however, direct our attention to questions that the participants will have to address either early or late in their collaboration in order to succeed.

These questions are strongly inter-related. For example, why you are there will say a lot about what you intend to accomplish, who else is necessary in order for you to be successful, and what kind of relationships you want to create with your counterparts; having the right people participate will engage the resources and sponsorship necessary for success; unity of purpose can provide the openness and teaming necessary to mature; clarity around what you intend to do will enable you to achieve your goals and create joint ownership of your processes and products.

The questions don't need to be answered perfectly, once and for all, before anything can be attempted or accomplished. Learning together and making adjustments based on experience are essential to any new venture, especially labor-management collaboration. However, if they are never discussed at all, you are more likely to learn “the hard way”, undergoing unnecessary frustration and discouragement.

Once discussed and agreed upon, it's useful to review these questions periodically to determine whether you're still on track or a change in direction is needed. A charter, defined process, or other written record of your answers can also serve as a living document to remind participants of why they agreed to collaborate in the first place.

Who to Involve

If participants in labor-management partnership can be “representatives from management, the union, and represented employees,” who might these include?

- **Management:** Supervisors, second-level managers, directors, executives, Human Resource Generalists and their managers, Union Relations staff?
- Can you think of others who could bring management’s perspective, expertise, and resources to bear?
- **SPEEA as an institution:** SPEEA Council Representatives, Executive Board members, and staff?
- Are there others who, by virtue of their positions in SPEEA, can be said to represent the views and interests of both SPEEA as an institution and its membership?
- **Represented employees:** Area Reps, members with interest or expertise in particular issues or who have demonstrated their commitment to collaborative problem-solving?

What other characteristics would you want SPEEA members who participate in partnerships with management to have?

With so many possible participants, it may seem difficult to narrow down the list. But, in fact, local labor-management collaboration doesn’t have to include every conceivable participant. It may be as small as one Council Rep and one Human Resource Generalist who agree to talk regularly, exchange information on emerging issues and look ahead to decisions and initiatives that will impact the membership. It may be an ad hoc SPEEA/Boeing team chartered to address a single significant issue. It may be as large as a standing site partnership that needs representation from all the programs and functions at a particular location. Or it may be anything in between.

Here are two parameters to consider when thinking about who should be included:

- **Scope: who is affected by the issues you’d like to address?** The larger the number of people affected, the larger the circle of participants who will be required to **generate meaningful dialogue, identify issues and possible solutions, contribute resources, and create ownership** in the plan and its outcomes. If, for example, the issues are limited to the SPEEA members in a particular work group or small organization, it might be sufficient to include local management, Human Resources, SPEEA elected officials from that area, and members with particular expertise. If the issues affect SPEEA members at the site level, then a broader representation from all three categories (management, SPEEA, and the membership) would be required.
- **Purpose: what are you trying to accomplish?** If the purpose of your partnership is to improve communications between SPEEA members and their management, its important to include those who have information to share and those who can

establish and maintain the means for sharing it effectively. If it is to work together on issues of mutual interest for mutual benefit, it's important to include the **key stakeholders** who can **discuss, decide, and deliver** outcomes that work for all. **Please note**, however, that it's not always necessary to have the final management decision-maker in the room for partnership meetings any more than it's necessary to have every affected SPEEA member there. What's important in both instances is that they know, understand, and approve the work of the partnership. In some cases, SPEEA and management partnership participants have taken their recommendations **together** both to management **and** SPEEA members for validation and action.

The responsibilities of SPEEA Elected Officials

As elected officials, SPEEA Council Representatives and Executive Board members have dual responsibilities in labor-management partnerships:

- **They represent SPEEA as an institution:**
 - Their words and actions reflect on the competence and credibility of SPEEA as the representative of the membership; therefore they are often called upon to set aside their personal interests to pursue the good of all. Managers may judge SPEEA's effectiveness by how well they do this, and their impressions can affect SPEEA/Boeing relations on other issues and in other venues.
 - Participation by SPEEA elected officials signals to the members that they can express concerns that they might not feel comfortable expressing in their normal work environments. For this reason, it's important for Council Representatives and Executive Board members to promote partnership environments where constructive, meaningful dialogue can occur without fear of retaliation.
- **They represent SPEEA's members.** So they seek to:
 - keep members informed of the partnership's purpose and activities
 - actively solicit members' views on partnership issues and present them to their partnership teams
 - work with their management partners to create opportunities for members to participate in partnership activities when appropriate

SPEEA member involvement

SPEEA members who are not elected officials can participate in partnership activities. They may, for example, serve on task teams that are chartered to study or address specific issues. Or they may be invited to participate in initiatives because of their special interest or expertise. In either case, it's sometimes unclear to them whether they are expected to represent the views of the membership or their personal perspectives. They may not be qualified to speak for others' interests or feel safe expressing ideas and opinions outside of what would be acceptable in their normal work environments. To be fair to them, make the most of their contributions, and allow them to have a positive experience of partnership, there needs to be **explicit agreement between the SPEEA and management partners on clear expectations for their roles, responsibilities, and boundaries.**

The Value of Partners

One element that contributes significantly to the success of labor-management partnerships is the willingness of the partners to recognize, appreciate, and utilize the different assets that they each bring to the table. This would seem to be the *sine qua non* of partnership: **understanding how together the participants can achieve more than any of them could alone.**

If you were to list **the assets that management as a community brings to partnership**, would your list include:

- Resources, authority, and influence?
- Information about future business direction and organizational vision?
- Business and technical expertise?
- Modeling behaviors that are emulated in the workplace?
- Making decisions that influence change in the culture?
- Determining rewards for and recognition of the workforce?
- Defining how they will use their influence and authority?
- Opening the door to change and new opportunities?
- Oversight of the work environment (e.g., flex schedules, hoteling, overtime, assignment distribution, utilization)?
- Provision of vital information through supervisors as a critical link between employees and the organization?
- Application of rules, policies, procedures, processes?
- Inspiring and motivating employees?
- Providing information to the workforce on what is or will be considered “value added” in the future?

What other assets would you add to your list?

How could management apply these in partnership for the benefit of both the employees and the organization?

If you were to list **the assets that SPEEA as an organization brings to partnership**, would your list include:

- Creating a safe venue for employees to raise issues and express ideas?
- Ability to elevate issues to a higher level?
- Ability to take “initiative” to reality?
- Credibility with workforce?
- Ability to communicate quickly and effectively?
- Accountability – providing assurance that management will “walk the talk”?
- An independent, outsider’s view of the workplace?
- Providing a “balance of power”?
- Influence over employee morale and attitudes?

- A catalyst for change with a broad stakeholder perspective?
- A collective voice for employee interests and concerns?
- Affiliations with other labor organizations to acquire best practices, resources, and influence?
- A democratic process with a balance of interests?
- Heightened awareness of employee issues?
- An independent voice for expressing employee interests and concerns?

What other assets would you add to your list?

How could SPEEA apply these in partnership for the benefit of both the employees and the organization?

If you were to list **the assets that SPEEA members bring to partnership**, would your list include:

- Intellectual and behavioral capabilities?
- Knowledge, judgment, and experience?
- Energy and passion?
- A unique stakeholder perspective?
- Front line knowledge and experience of what works and what doesn't?
- Discretionary effort?
- Personal investment in outcomes and success?
- "Hearts and minds": commitment?
- Ability to mobilize and create synergy?
- Enormous influence over ultimate outcome and success?
- Effective, informal grassroots culture?
- Opinion leaders?
- Continuity in
 - Product knowledge?
 - Collective wisdom of organizations?
- Critical mass/momentum?
- Diversity?
- What other assets would you add to your list?
- How could SPEEA members apply these in partnership for the benefit of both themselves and the organization?

Mutual Interest / Mutual Benefit

What does it mean to work together in partnership “voluntarily on issues of mutual interest for mutual benefit”?

Voluntary

There is no requirement that an organization or site have a SPEEA/Boeing partnership or that any individual participate in one. People **choose** to participate because:

- they see the potential **benefit** for SPEEA, its members, and their organizations
- they believe that in collaboration they can **accomplish more** than any of them working alone by utilizing the different assets that they each bring to the partnership
- they are **willing** to make the investments of time and energy necessary to succeed
- they understand the responsibilities of **leadership** and how it contributes both to their personal development and the good of all

Mutual Interest

Mutual interest reflects the overlap of mission that exists between SPEEA, SPEEA-represented employees, and their management. It calls attention to their inter-dependence and underscores the benefits of working together.

For example, SPEEA, SPEEA-represented employees, and local management share an interest in **employee career development**:

- Employees are interested because they want to enhance their knowledge, skills, job security, satisfaction, recognition, and salaries
- SPEEA is interested because it wants to advance the priorities of its members in effective ways that demonstrate the value of the union
- Local management is interested because it wants employees who are skilled, productive, knowledgeable, and satisfied

Interest drives commitment. When people assign a high priority to an area of interest, they are more motivated to do those things that will serve that interest. Something people discover early in their experience with labor-management collaboration is that the other participants are already very good at determining their interests and priorities. As a result,

- they cannot be persuaded to be interested in something when they're not
- they cannot be forced to be interested in something when they're not
- they **can** be offered the opportunity to **reflect** on their interests and **explore** the possibility of furthering them by working together

Mutual Benefit

Mutual benefit is **the deliverable** of labor-management partnership. When it is perceived as insufficient, unclear, or even counter-productive by the intended beneficiaries, the value of the collaboration is seriously questioned. Therefore, participants in successful

partnerships:

- make the effort to find out what those they represent really need
- work together to define work plans to address those needs that are doable and within scope, even when it means making progress rather than solving the whole problem
- engage the intended beneficiaries in the process whenever possible
- communicate the progress and activities of the partnership to the intended beneficiaries regularly, inviting their input throughout the process
- prepare to make course corrections based on that input
- make their achievements visible to those who are affected

How is it different?

Local labor-management partnerships are different from either contract enforcement or integrated work teams in many ways and often require different skills, roles, and expectations. Here is a brief comparison of some of the differences:

Contract Enforcement

- Management authority is provided by the board of directors, state and federal laws and regulations
- Union authority is provided by the National Labor Relations Act, collective bargaining agreements, state and federal laws and regulations, company policies and procedures
- Unions, as the elected representatives of the bargaining units, function as advocates in an adversarial system, negotiating contract terms and policing managements' compliance
- Conflicts may be resolved through negotiations, grievances, appeals, arbitration, the National Labor Relations Board, and the courts

Integrated Work Teams

- Management authority derives from the chain of command and is exercised according to statements of work developed at higher levels
- Employee authority is provided by management direction or consent for statements of work developed at higher levels
- Employees, as agents of the company, function by management direction or consent according to job descriptions, performance goals, and organizational parameters
- Conflicts may be resolved by taking them up the chain of command to a management authority empowered to do so

Local Labor-Management Partnerships

- Participant authority is provided by mutual consent, sponsored by those represented
- Participants engage voluntarily
- Participants function based on mutual interest for the mutual benefit of those represented
- Conflicts are the responsibility of the participants to resolve

In labor-management partnerships, therefore, the participants work together in a context with **more ambiguity**, have **more responsibility**, and can explore **more possibilities** than in traditional labor relations or integrated work environments. These differences can have the impact of:

- increasing the need for regular and routine “closed-loop” communications between partnership participants and those they represent
- shifting the focus of communication between the partnership participants themselves away from negotiation and persuasion toward joint exploration and

- open collaboration
- adopting processes, setting goals, and implementing plans by mutual consent rather than by either reference to written or external authorities
 - changing conflicts into opportunities for growth, rather than denying, managing, or “winning” them
 - allowing greater synergy by utilizing the assets that each party brings to the partnership