

**EXPECTATIONS AND OBLIGATIONS OF THE MEMBER-UNION
RELATIONSHIP – A PSYCHOLOGICAL CONTRACT PERSPECTIVE**

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COMMENTS

The reader should keep the following in mind:

- The editorial as well as reference style utilised in this dissertation, follow the format prescribed by the Publication Manual (Fifth edition) of the American Psychological Association (APA) – unless indicated otherwise for the purposes of revision and publication of parts of this dissertation. This is in line with the policy of the Programme in Industrial Sociology at the North-West University (Potchefstroom) to use APA style in all scientific documents as from January 1999.
- Chapters 1, 3 and 4 utilised an American Psychological Association (APA) reference and editorial style. Chapter 2 (Article 1) utilised an editorial and reference style prescribed by the South African Journal of Labour Relations as it was submitted to this journal for revision and publication (see Addendum 1).
- The dissertation is submitted in the form of two research articles.
- Chapter one comprises the proposal for this study as presented and accepted by the North-West University on the 22nd of May 2008.

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TABLE OF CONTENTS

LIST OF TABLES	6
CHAPTER 1: RESEARCH PROPOSAL	8
INTRODUCTION.....	9
PROBLEM STATEMENT	12
RESEARCH OBJECTIVES	13
a) Research objective	13
b) Specific objectives	13
RESEARCH METHODOLOGY	13
a) Phase 1: Research article 1	13
b) Phase 2: Research article 2	14
c) Research design	15
d) Measuring instrument.....	18
RESEARCH PROCEDURE	18
DIVISION OF CHAPTERS	20
BIBLIOGRAPHY	20
CHAPTER 2: EXPECTATIONS AND OBLIGATIONS GOVERNING THE MEMBER-UNION RELATIONSHIP – A PSYCHOLOGICAL CONTRACT PERSPECTIVE.....	23
ABSTRACT.....	24
Authors.....	24
Introduction.....	25
Research design and sampling	26
Results and description of findings	28
The psychological contract perspective.....	31
Union obligations.....	32
Member obligations	37

Summary, discussion, and possible future research	40
Reference list.....	43
CHAPTER 3: TOWARDS A MEMBER-UNION PSYCHOLOGICAL CONTRACT MEASURE	46
ABSTRACT	47
AUTHORS.....	47
INTRODUCTION.....	48
LITERATURE REVIEW	51
OBJECTIVES OF STUDY.....	53
RESEARCH DESIGN AND PROCEDURE.....	53
Questionnaire design.....	54
FINDINGS	56
Content of member-union psychological contract.....	56
Factor 3: Emotions concerning member-union psychological contract.....	59
Factor 4: State of the member-union psychological contract.....	59
CONCLUSION AND SUGGESTIONS FOR FUTURE RESEARCH	60
BIBLIOGRAPHY	62
APPENDIX 1 – THE MEMBER-UNION PSYCHOLOGICAL CONTRACT QUESTIONNAIRE.....	65
CHAPTER 4 – DISCUSSION, CONCLUSION, LIMITATIONS AND SUGGESTIONS FOR FUTURE RESEARCH	68
INTRODUCTION.....	69
DISCUSSION	69
Objective 1 (Article 1)	69
Objective 2 (Article 2)	70
LIMITATIONS	72
SUGGESTIONS FOR FUTURE RESEARCH	72
CONCLUSION	73

BIBLIOGRAPHY	73
ADDENDUM 1 – SOUTH AFRICAN JOURNAL OF LABOUR RELATIONS	75
ADDENDUM 2 – EDITORIAL POLICY AND GUIDELINES FOR CONTRIBUTORS	76
ADDENDUM 3 – EXPECTATIONS AND OBLIGATIONS OF THE MEMBER- UNION RELATIONSHIP QUESTIONNAIRE.....	79

LIST OF TABLES

Table Description

Chapter 2

Table 1: Union obligations (n=56) 29

Table 2: Member obligations (n=56) 30

Chapter 3

Table 1: Perceived union obligations of trade union members 49

Table 2: Perceived obligations of trade union members to the union..... 50

Table 3: Participant characteristics 54

Table 4: Frequencies and descriptive statistics of Union Obligations 56

Table 5: Frequencies and descriptive statistics of Member Obligations..... 58

Table 6: Frequencies and descriptive statistics of Emotions concerning the psychological
contract 59

Table 7: Frequencies and descriptive statistics of the State of the psychological contract. 60

CHAPTER 1: RESEARCH PROPOSAL

Chapter one comprises the proposal for this study as presented and accepted by the North-West University on the 22nd of May 2008.

INTRODUCTION

Traditionally, psychological contract research has focused on the employee-employer relationship as a mechanism to explain the perceived underlying feelings and obligations that both the employee and employer has in regards to each other in the reciprocal relationship (Rousseau, 1990; Dabos & Rousseau, 2004). More recent research done by De Witte, Sverke, Van Ruysseveldt, Goslinga, Chirumbolo, Hellgren, and Näswall (2008), and Turnley, Bolino, Lester, and Bloodgood (2004) regarding job insecurity and union support, and the effects of psychological contract breach on union commitment, suggest that there may also be a psychological contract between the employee and the union, and that this relationship influences the traditional employee-employer relationship and in turn is affected by the member-union relationship. Consequently, the need for research into the member-union relationship is necessitated to obtain an enhanced overall perspective of the employment relationship and the underlying workings thereof.

Work activity, in an industrial society, according to Taylor (1996), is “organised on the basis of an exchange relationship between the employer and employee” (p. 3), which is known as the employment relationship. The existence of such a relationship is, however, dependent on whether or not an employment contract exists and whether or not the ‘employee’ is part of the organisation (Spooner & Haidar, 2006). According to Spooner and Haidar, an employment relationship refers to “the relationship between two persons – and not to the work itself” (p. 67).

Several different sources refer to the employment relationship as a relationship between the employer and employee (Nel, Swanepoel, Kirsten, Erasmus, & Tsabadi, 2005; Spooner & Haidar, 2006; Taylor, 1996; Venter, 2004). A more encompassing definition, however, is provided by Lewis, Thornhill, and Saunders (2003), and states that the employment relationship is “an economic, legal, social, psychological and political relationship in which employees devote their time and expertise to the interests of their employer in return for a range of personal, financial and non-financial rewards” (p. 6).

Both the legal and psychological relationship within the employee-employer relationship has been the topic of numerous research articles. The psychological contract, according to Robinson and Rousseau (1994), can be defined as:

An individual's belief regarding the terms and conditions of a reciprocal exchange agreement between that focal person and another party... a belief that some form of promise has been made and that the terms and conditions of the contract have been accepted by both parties. (p. 246)

Though the theory underlying the psychological contract perspective has traditionally been used to explain a vast array of divergent research topics, it has yet to be utilised to specifically depict the member-union relationship. According to Rousseau (1990) at least two kinds of psychological contracts can be identified within the employee-employer relationship: transactional and relational – the transactional contract being a publically observable written agreement, and the relational contract being a subjectively understood, intrinsic contract both which covers mutual respective obligations of both the employee and employer. It is suggested by De Witte *et al.* (2008) that it may be worthwhile to determine whether or not these two psychological contracts can also be distinguished within the member-union relationship.

Both the employer, the employees fulfil different roles within the employment relationship. Their roles within this relationship, is as follows:

- a) Employees 'sell' their labour to employers to perform specific tasks, and are represented by trade unions (Nel *et al.* 2005). Employees sell their skills to employers in return for remuneration, so that they may fulfil their needs.
- b) Employers' role within the employment relationship is to manage the organisation so that the organisation realises its ultimate objectives. This is achieved through decision-making and strategising about the dispersal of scarce resources – including human resources (Nel, Swanepoel, Kirsten, Erasmus, & Tsabadi, 2005). The employees under the employer have needs and expectations directed at the employer regarding their work, such as (but not limited to): their working conditions, training, regular feedback and communication, equal employment opportunities, personal and career development, and the provision of job security. The employer try to accommodate these needs through remuneration, collective agreements, the employment contract, rules and regulations in the organisation, and opportunities for advancement through training, development and promotion. By acknowledging and accommodating these needs, the employer attempts to achieve the organisations ultimate objectives, through an increase in work-wellness and job satisfaction, worker participation and increased productivity.

Within this employee-employer relationship, however – apart from the transactional contract – there are also individual beliefs and perceived expectations regarding the terms and conditions of the reciprocal exchange agreement (the relational contract) from both the employer (towards the employee), and the employee (towards the employer) (Rousseau, 1990). If these individualised perceptions and beliefs are not adhered to, a breach or violation of the psychological contract occurs. Recent studies have made definite links between the employee-employer psychological contract and the member-union relationship (Turnley, Bolino, Lester, & Bloodgood, 2004; De Witte *et al.*, 2008).

According to D'Art and Turner (2006) “organisations are essentially hierarchical structures of power and its distribution between management and worker in fundamentally unequal” (p. 524). This skew and unequal distribution of power gives way to an environment of domination and subordination and tends to nurture opposing and conflicting interests between employee – with less power and influence – and employer – with more power and influence. Power is thus a crucial influence in the employment relationship and the wellbeing thereof (D'Art & Turner). According to D'Art and Turner, employers, while pursuing the object of control, should “simultaneously attempt to engage and mobilise worker consent, creativity and cooperative power” (p. 525).

D'Art and Turner (2006) have shown that the employment relationship has undergone some changes since 1995 and is now characterised by a number of new features. D'Art and Turner also identified the most prominent of these “as training, education and skill development opportunities, employee involvement in decision-making or empowerment and two-way communication” (p. 526). The employee now plays a bigger part in the new employment relationship by contributing to the organisational goals on a daily basis. Employees are also included in decisions about factors that influence them, and they are given the opportunity to promote their skills to the required standards of the organisation, in order to maintain their position or to rise in the hierarchical structure of the organisation.

Conflicting interests, asymmetrical power distribution and the commoditisation of labour – all characteristics of the traditional employment relationship – lead to unionisation (D'Art & Turner, 2003). In South Africa there are definitely conflicting interests, with regards to promotions and affirmative action. Employees also desire more control and influence in the workplace, which they don't always get. According to D'Art and Turner (2006), job security and stability, important factors for employees, are still lacking in the new employment

relationship. D'Art and Turner ascribe this perceived job insecurity to "reduced trust in employers and reluctant compliance with employer demands" (p. 535). Unionisation and other control and influence measures, thus, are still taken to try and manipulate/change the employment relationship for the benefit and well being of the parties within it, and according to De Witte *et al.* (2008) "job insecurity can be accompanied by a reduction in perceived union support and with the intention to resign membership" (p. 99).

PROBLEM STATEMENT

According to De Witte *et al.* (2008):

Employees mainly join unions to protect themselves, and protection against job insecurity and dismissal is one of the components of this motivation. Members thus enter into a type of business transaction with their union: in exchange for their financial contribution, the union must provide protection and a sufficient level of security (p. 96).

Accordingly, if employees perceive a breach or violation of their psychological contract within their relational agreement with their employer, they also perceive a failure in the perceived obligations of their union – and thus a breakdown in their relationship with their union. The question that needs to be answered though is whether the employee has both a transactional and relational contract with its union, which will indicate that there is in fact a definite psychological contract between the employee and the union.

According to Rousseau (2000) contracts can be conceptualised on a relational-transactional continuum; transactional referring to short-term, monetary or economic arrangements, and relational referring to open-ended, socio-emotional arrangements. It is suggested that all contracts fall on this continuum between relational and transactional – but all contracts contain a portion of both. A healthier rationalisation of the relationship between transactional and relational contracts though, comes from study conducted in the United Kingdom by Millward and Herriot (2000) whom proposes that the transactional-relational connection is not necessarily an exclusive one, but rather that the contractual relationship contains varying levels of both transactional and relational elements. The existence of a relational portion between the arrangement involving the employee and the union will indicate the existence of a psychological contract with the union, which in turn will open vast doors for future research.

The suggestion of a psychological contract between the employee and the union is one that needs to be explored because of the impact that the employee-employer relationship can have

on the member-union relationship, and vice versa. These two relationships are intertwined within all organisations, and research into this field is integral as feelings or perceptions of psychological contract breach and/or violation within the one relationship, can adversely affect the other. There have been no studies in this specific arena, and two previous studies have suggested it for future research – De Witte, Sverke, Van Ruysseveldt, Goslinga, Chirumbolo, Hellgren, and Näswall (2008), and Turnley, Bolino, Lester, and Bloodgood (2004).

RESEARCH OBJECTIVES

a) Research objective

The main focus of the proposed study is to explore and investigate the member-union psychological contract.

b) Specific objectives

- a. Determine the contents of the member-union psychological contract.
- b. Determine the expectations and obligations associated with the member-union psychological contract.

RESEARCH METHODOLOGY

The main focus of the proposed study is to determine whether or not a psychological contract exist between the employee and the union. As mentioned above, all contracts fall within the scope of both a transactional and relational agreement, and to investigate the content of a psychological contract between the employee and the union, there needs to be a relational contract present in the member-union relationship.

a) Phase 1: Research article 1

Traditional research involving the psychological contract has focused on the employee-employer relationship and the notion a psychological contract between the employee and the union is a new perspective within the employment relationship and application of psychological contract theory.

The first article will therefore attempt to reach the first specific objective by formulating researchable themes through qualitative research methods. To achieve this objective, the following research methods will be utilised:

- a. Questionnaires posing open-ended questions will be disseminated to identify themes within the psychological contract between employees and their respective unions with a smaller amount of respondents. Such open-ended questions will allow detailed responses (Struwig & Stead, 2001). The identified themes will be confirmed through a literature review, and will then be used to develop a measuring instrument based on a presently available psychological contract questionnaire (Psycones, 2005), which will measure the identified themes to reach the first specific objective. Data coding, in which information is grouped into themes by using codes, will be used to identify the themes for further research (Struwig & Stead).
- b. After the themes have been identified, a revised version of a presently available psychological contract questionnaire – the Psycones questionnaire (Psycones, 2005) – will be developed which can be utilised in the second article to reach the second articles' objective.
- c. Descriptive statistics will then be used to provide statistical summaries of the data so as to provide an overall, coherent and straightforward picture of the obtained data for interpretation (Struwig & Stead, 2001).
- d. The constant comparative method of coding will be used to establish themes associated with the member-union relationship through a qualitative means and hypothesis for testing can be developed as the study progresses (Struwig & Stead, 2001). This form of qualitative content-orientated assessment will address “the terms and reciprocal obligations that characterise the individual’s psychological contract” (Rousseau & Tijoriwala, 1998). The themes established will then be used to devise a questionnaire for measuring the psychological contract associated with the member-union relationship.

b) Phase 2: Research article 2

The second article will attempt to reach the second specific objective, which is to investigate expectations and obligations associated with the member-union relationship. To achieve this objective, the following research methods will be utilised:

- a. The identified themes from the first article will be used to develop a questionnaire measuring the member-union relationship and will be administered to a sample drawn from the target population.
- b. Descriptive statistics will be used to provide statistical summaries of the data so as to provide an overall, coherent and straightforward picture of the obtained data for interpretation (Struwig & Stead, 2001). These descriptive statistics will be aimed at describing four variables – the perceived employee obligations, the perceived union obligations, the current emotional state of the member-union psychological contract, as well as the current state of the member-union psychological contract.

c) Research design

The proposed study will be both qualitative and quantitative in nature as it will include characteristics of both – predominantly quantitative. Since the subject is a fresh approach to the applicability of the psychological contract, an instrument for the measurement of the member-union relationship needs to be developed which will rely on qualitative designs. After the measuring instrument has been developed, it will be administered to a sample of the proposed research population and the findings will be interpreted through various statistical methods which will be quantitative in nature.

The proposed studies are exploratory (article 1) and descriptive (article 2) in nature:

- a. The first article (qualitative approach) will attempt to establish the themes associated with the psychological contract between the employee and the union and illuminate the relationship on both a transactional and relational level. This will be done by means of a statistical method which will firstly examine the prerequisites for the existence of a psychological contract, the underlying themes for the establishment and assessment of a research instrument; and secondly, these themes will be utilised in the development of a questionnaire derived from the qualitative part of this study for the measurement of the psychological contract between the member and the union.
- b. The second article (quantitative approach) will through the designed questionnaire attempt to measure the expectations and obligations associated with the member-union psychological contract, as well as the current emotional state, and state of the member-union psychological contract.

The first article will start by providing a thorough background to explain the underlying reasons and motives for the study, followed by the empirical study, which will identify common themes associated with the member-union psychological contract through a qualitative means. The technique used to obtain the data as well as an explanation of the findings of the empirical study will be explained. The findings of the empirical study will then be reviewed and examined through a literature review. The article will finish with a conclusion which will give an overview of the literature review, the motives for the study, as well as the findings of the study, and will make recommendations for future research.

The second article will, through a literature review, firstly establish a thorough background of the study by taking into account the applicable literature and previous research on the subject, and placing them in an applicable and coherent order within the review; secondly it will attempt to explain the underlying reasons and motives for the study. After the literature review, the empirical study will follow – consisting of a member-union psychological contract questionnaire derived from the themes identified in article 1 – explaining exactly how the study was conducted and explaining the findings thru the use of descriptive statistics. Lastly, the article will finish with a conclusion which will give an overview of the literature review, the motives for the study, as well as the findings of the study, and will make recommendations for future research.

Other aspects of the study will see as follows:

- Research population and type of sample to be drawn – It is proposed that schools be approached within the North West Province which will form part of the research population, and the final questionnaires be administered to a percentage of their teachers. A smaller sample will be drawn initially for the qualitative portion of the study, and then a larger, more representative sample will be drawn for the administering of the questionnaires. Permission to conduct the research will be obtained from the South African Department of Education.

Due to the fact that this is a predominantly exploratory research design, it is suggested that the qualitative process continues until the identification

of original themes for research is exhausted to ensure an inclusive research design. Union officials from recognised educator unions will also be included in the study through qualitative interviews to focus on the interrelations between employee and union obligations in an attempt to operationalise contract content (Rousseau & Tijoriwala, 1998), and determine the reciprocal obligations associated with the member-union psychological contract – this will be done because the foundation of employment contracts (the psychological contract included) constitutes a reciprocal relationship between discrete member and union obligations (Rousseau & Tijoriwala).

The questionnaires, after developed and revised, will be administered to the teachers. Seeing as this study is based on a fresh approach, it is suggested that at least 100 respondents – preferably between 150 and 200 – should complete the questionnaire to increase the likelihood of precision and reliability (Struwig & Stead, 2001). According to Struwig and Stead, “sample sizes of 150 to 200 can provide an acceptable reflection of the population” (p. 119). Another reason for the large amount of respondents is to account for non-response factors and to increase statistical precision.

Teachers will be used as respondents for the questionnaires (in both article 1 and 2) from differing areas and schools in the North West Province to accommodate as much as possible differing views, perceptions and cultural backgrounds in the study as possible. Union officials from recognised educator unions will also separately, form part of the qualitative research process (through personal interviews) to obtain a more inclusive result – this will increase the reliability and precision of the findings (Struwig & Stead, 2001).

- Units of analysis – Individuals (teachers) within the targeted research population will form part of this study. Union officials from recognised educator unions will also form part of the qualitative research procedure in article 1.
- Time-dimension – Data will be gathered from a sample in a cross-sectional design due to financial and time constraints.

d) Measuring instrument

The first article will attempt to prove the existence of a psychological contract between the employee and the union through identifying underlying themes governing the member-union relationship. Since this subject – the existence of a psychological contract between the employee and the union – is innovative in approach, a measurement instrument needs to be developed. This will be done through open-ended questionnaires filled out by respondents – as well as personal interviews with union officials – in which the themes for assessment will be identified, and incorporated into a new psychological contract questionnaire which will focus on the psychological contract between the employee and the union (the identified themes will be incorporated into a new instrument based on the Psycones (Psycones, 2005) psychological contract questionnaires).

In the second article, the questionnaire will be administered to a sample drawn from the target population, and the data statistically analysed.

a. Statistical analysis

SPSS (a statistical analysis program), will be utilised for the statistical analysis of this study. Reliability, validity, descriptive statistics, and descriptive statistics – such as means, standard deviations, skewness and kurtosis, inferential statistics – will be determined by this program in order to give meaning to the gathered information, and enable the researcher to interpret the findings of this study.

The statistical analysis will enable me to answer the set research objectives and will offer the data in a meaningful way. The analysis will enable me to measure the themes identified in the interviews within the newly developed questionnaire and use this information to determine the content of the member-union contractual relationship; also, to identify the connotations associated to the relational contract from the employees' perspective of the unions' obligations as well as the obligations unions expect of their members.

RESEARCH PROCEDURE

A letter and research proposal will be sent to the Ethical committee of the North-West University (NWU) requesting the approval of the research study. Once consent has been received from the Ethical committee of the North-West University to proceed with the research study, I will continue with the research. Firstly, the Department of Education will be

contacted to obtain permission to continue with the research within the educational sector in the North West Province. After permission has been obtained, the research will commence with the arrangement of appointments with a predetermined percentage of the school principals. At each meeting the school principal will be explained the reason for the study, and what it implies for the school faculty with consideration given to the period of time needed and the amount of faculty members. The school principal will then be asked permission to continue with the study at the specific school.

After permission has been obtained the open-ended questionnaires can be administered to a small percentage of respondents at each school that forms part of the sample drawn, to determine themes that need to be assessed for the construction of the revised questionnaire. Also, union officials will separately form part of the qualitative interviewing process to determine their discrete expectations and obligations associated with the member-union relationship in order to determine interrelations between union and member expectations and obligations – this will ensure a more inclusive questionnaire design for assessment of the psychological contract between member and union (Rousseau & Tijoriwala, 1998). This will be continued until the identification of new themes is exhausted.

A bigger, more representative sample will then be drawn from the population whom each will have to complete the newly developed questionnaire measuring the member-union psychological contract. The questionnaires will be accompanied by a letter stating the ethical aspects regarding the research as well as reassurance of confidentiality and anonymity. Ample time will be given for these respondents to complete the questionnaire and I will continually encourage the respondents to complete the questionnaire.

Once all the data have been obtained, it will be entered into a computer for statistical analysis, and the research articles' literature review can commence to confirm the themes identified through the qualitative component (article 1), and give a thorough background to the study (article 2).

The first article will focus on determining the contents of the psychological contract associated with the member-union relationship and the identification of researchable themes, while the second article will focus on the expectations and obligations associated with the member-union relationship, as well as the state of the member-union relationship.

DIVISION OF CHAPTERS

The chapters of the proposed study will be arranged as follows:

Chapter 1: Research proposal and problem statement.

Chapter 2: Research article 1

- a) Introduction
- b) Qualitative empirical study – Which includes the identification of research themes through an open-ended qualitative questionnaire and personal interviews held with union officials.
- c) Literature review
- d) Discussion of findings.
- e) Conclusion, limitations and suggestions for future research.

Chapter 3: Research article 2

- a) Introduction
- b) Literature review
- c) Quantitative empirical study – which will include an overview of the qualitative component of designing the research instrument and the compilation and administration of the questionnaire measuring the psychological contract within the member-union relationship.
- d) Discussion of findings.
- e) Conclusion, limitations and suggestions for future research.

Chapter 4: Conclusions, limitations and recommendations for future study.

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CHAPTER 2: EXPECTATIONS AND OBLIGATIONS GOVERNING THE
MEMBER-UNION RELATIONSHIP – A PSYCHOLOGICAL CONTRACT
PERSPECTIVE

Chapter 2 (Article 1) was submitted for revision and publication to the South African Journal of Labour Relations (see Addendum 1), and the editorial and reference style was adapted in accordance with the editorial policy and guidelines for the submission of papers to this journal. Hence, the “Editorial policy and guidelines for contributors” of the South African Journal of Labour Relations, has been included for reference (see Addendum 2).

Expectations and obligations governing the member-union relationship – A psychological contract perspective

ABSTRACT

This qualitative research paper employs psychological contract theory, in order to determine the existence of a psychological contract between trade unions and their members. This is accomplished through identifying the underlying expectations and obligations that govern this relationship. The identified expectations and obligations are categorised into themes according to similarity, and motivated through literature on psychological contract theory and other relevant theories.

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Introduction

Psychological contracts, according to Rousseau (1989:123), can be defined as “an individual’s beliefs regarding the terms and conditions of a reciprocal exchange agreement between that focal person and another party”. Traditionally, the psychological contract theory has been used to explain the perceived reciprocal expectations and obligations within the employee-employer relationship (Dabos & Rousseau, 2004; Rousseau, 1990; Rousseau, 1989). More recently, the application of the psychological contract theory has shifted from the traditional (the employee-employer relationship) to other relationships that also influence, and are in turn influenced, by the traditional employment relationship (De Witte, Sverke, Ruysseveldt, Goslinga, Chirumbolo, Hellgren & Näswall, 2008; Turnley, Bolino, Lester & Bloodgood, 2004; Knapp, 2008; Sverdrup, Haukedal & Grønhaug, 2008).

The traditional employment relationship is conceived as consisting of an exchange relationship between the employer and employee within the workplace (Nel, Swanepoel, Kirsten, Erasmus & Tsabadi, 2005; Spooner & Haidar, 2006; Taylor, 1996; Venter, 2004). A fuller description, however, is provided by Lewis, Thornhill, and Saunders (2003:6), who state that the employment relationship is “an economic, legal, social, psychological and political relationship in which employees devote their time and expertise to the interests of their employer in return for a range of personal, financial and non-financial rewards”.

Recent studies have suggested that the psychological contract theory may be applicable to other relationships within and outside the work environment. De Witte *et al.* (2008), for example, apply the psychological contract perspective to the relationship between union members and their unions, in order to explore the consequences of perceived job insecurity among union members on their intention to resign union membership. They find that the perceived “job insecurity can be accompanied by a reduction in perceived union support with the intention to resign membership” (De Witte *et al.*, 2008:99).

A study conducted by Turnley *et al.* (2004) determines the effects of experienced psychological contract breach in the employment environment on union commitment. The study also suggests the existence of underlying expectations and obligations within the member-union relationship, which may constitute the possible existence of a relational contractual agreement between the union member and his or her union.

Studies conducted by Knapp (2008) and Sverdrup *et al.* (2008) also suggest applying the psychological contract theory to relationships other than the traditional employee-employer relationship, such as the relationships relating to divergent stakeholders in the organisation.

Although the theory underlying the psychological contract perspective has traditionally been used to explain a vast array of divergent research topics, it has yet to be utilised to specifically depict the member-union relationship. As a stakeholder in the organisation, the union is influenced by, and in turn, exerts a strong influence on the organisation. The application of the psychological contract theory to the member-union relationship is thus of great importance for the establishment and maintenance of healthy, long-term relationships with the organisation, and particularly for union members functioning within divergent organisations.

This paper aims to identify and motivate themes associated with the member-union relationship using a qualitative method as a proposal for the assessment of the psychological contract between union members and their unions. These themes consist of the reciprocal expectations and obligations governing the relationship between the union member and union. This relationship is reciprocal, as the psychological contract theory constitutes mutual expectations and obligations within a relationship. The paper thus first determines the themes associated with the member-union relationship, and thereafter motivates and explains these determined themes with reference to literature on psychological contract theory and other related literature.

Research design and sampling

The research field is an innovative application of the psychological contract theory. Thus, no instrument currently exists for measuring the proposed psychological contract between the union member and his or her union. For this reason, this paper focuses on deriving themes associated with the member-union relationship, which can then be utilised to establish a quantitative measuring instrument for future research. This study made use of a qualitative exploratory style, as there is no previous research specific to this objective.

The research population examined is educators, because this is a highly unionised sector in South Africa, and teachers are readily available as volunteers as research subjects. Permission to conduct research at schools was obtained from the South African Department of Education, and after arranging with willing schools in the area, all volunteer teachers in each

school were given a questionnaire. They were requested to complete two qualitative questions:

1. Please list up to ten expectations that you have of your union (constituting union obligations); and
2. Please list up to ten obligations that you have towards your union (constituting member obligations).

The information gathered from the questionnaires was grouped according to similarity and an encompassing theme assigned to each group. The sample constitutes 56 respondents (n=56), excluding four union officials from recognised unions, and consists of teachers from six different schools in one city in the North West Province in South Africa. Respondents consisted of teachers in both primary and secondary schools in this city, and predominantly consist of white, married females, aged between 40 and 49. Union officials were included in the study through personal interviews, in order to substantiate and validate the findings of the study (the identified themes derived from the responses of teachers) and because of the reciprocal nature of the psychological contract. These officials are registered with unions that are recognised by the Department of Education and the Education Labour Relations Council, a Bargaining Council specifically for employees in the education sector in South Africa (ELRC, 2008).

This study employs an emic approach of reference in which the “research questions focus upon unique psychodynamic processes individuals introject into work settings” (Rousseau & Tijoriwala, 1998:682). The “frameworks are generated by the respondents themselves and are attempts to reflect the individual’s mental model in an unfiltered fashion, unconstrained by preconceived notions of the researcher” (Rousseau & Tijoriwala, 1998:682). For this reason, a qualitative research approach was selected, in order to determine the themes associated with the member-union psychological contract through content-orientated assessment. This was done to ensure ample information upon which to base the findings, and facilitate the examination of all topics.

Convenience sampling was used in obtaining volunteer respondents in the schools to fill out questionnaires. As personal and professional obligations did not allow for all of the teachers in every school to participate, only volunteer teachers in each school were given a questionnaire to complete. The questions in the open questionnaire were used to identify the reciprocal intrinsic expectations and obligations governing the psychological contract.

Questionnaires were administered to respondents until no more authentic themes could be identified from their responses, and research saturation was reached. Personal interviews were held with union officials from recognised unions, in order to compare views within this reciprocal member-union relationship and to confirm the identified themes. The two questions asked in these interviews were:

1. What are some of the expectations that you have of union members? (Constituting member obligations); and
2. What are some of the union obligations of union members (constituting union obligations)?

By establishing what employees believe their obligations towards the union are, and what they expect from their union through a qualitative means, sufficient information was obtained from which to derive the themes associated with the member-union psychological contract, for further explanation and assessment.

The responses received from both the teachers and the union officials were clustered according to similarity and correlating subcategories where then grouped together. Each group was assigned an explanatory heading representing the themes associated with the member-union psychological contract.

Results and description of findings

The derived themes associated with the member-union psychological contract are set out in Tables 1 and 2 that follow. Answers given by respondents were categorised, and the predominant categories identified, substantiated by the responses of the union officials interviewed. Each theme was then motivated through a review of psychological contract theory literature. According to Rousseau and Tijoriwala (1998:687), a “psychological contract is a composite or bundle of obligations”; therefore, for the purpose of this study, the psychological contract was divided respectively into union obligations and member obligations (each substantiated by underlying identified themes).

From the respondents’ responses regarding perceived union obligations, the following themes were derived (Table 1):

1. legislative obligations;
2. communication;
3. union conduct;

4. training and development; and
5. supplementary services.

Each theme constitutes substantive subcategories comprising the central theme. These themes were confirmed by union officials' responses on the unions' obligations towards members. The percentages indicate the number of respondents whose replies indicated the particular theme and subcategory (each respondent could name several subcategories). The column headed 'Union officials' represents interviewed union officials' substantiating responses to each sub-category.

Table 1: Union Obligations (n=56)

		Union officials	% of each theme	% of total
1	Legislative obligations			100%
	Negotiations	✓	91%	
	Workplace representation	✓	48%	
	Protect members' legal and human rights	✓	46%	
	Mediation	✓	41%	
	Advise members	✓	38%	
	Individual representation	✓	38%	
	Voluntary/democratic industrial action	✓	9%	
	Promote union power	✓	9%	
2	Communication			79%
	Keep informed regarding union activities	✓	87%	
	Personal, direct contact	✓	39%	
	Answer queries	✓	36%	
	Must be informed on labour law-related issues	✓	27%	
	Frequent communication	✓	18%	
	Follow up on problems handled	✓	16%	
	Consult members in decisions	✓	7%	
3	Union conduct			50%
	Speedy/timeousness	✓	36%	
	Reliability	✓	36%	
	Promote interests of members	✓	36%	
	Fair, uniform handling	✓	25%	
	Professionalism	✓	25%	
	Trustworthiness/confidentiality	✓	14%	
	External interests	✓	14%	
4	Training and Development			38%
	Member training and development	✓	86%	

5 Supplementary services	Empowerment	✓	33%	29%
	Occupational assistance	✓	19%	
	Provision of extra services and membership benefits	✓	75%	
	Involvement in selection process and interviews	✓	31%	

From the respondents' responses regarding perceived member obligations, the following themes were derived (Table 2):

1. union member conduct;
2. participation;
3. contractual agreement; and
4. communication.

Each theme constitutes substantive subcategories comprising the central theme. These themes were confirmed by the union officials' responses on their expectations of union members. The percentages indicate the number of respondents whose replies indicated the particular theme and subcategory (each respondent could name several subcategories). The column headed 'Union officials' represents interviewed union officials' substantiating responses to each sub-category.

Table 2: Member obligations (n=56)

		Union officials	% of each theme	% of total
1 Union member conduct				79%
	Support	✓	55%	
	Loyalty	✓	50%	
	Promotion	✓	43%	
	Response to requests	✓	30%	
	Positive attitude	✓	27%	
	Adherence to union requirements	✓	23%	
	Professional conduct	✓	20%	
	Provision of high quality work	✓	11%	
	Maintenance/protection of union image	✓	7%	
2 Participation				73%
	Attendance/involvement in union activities	✓	100%	
	Adherence to advice provided by union	✓	10%	
	Knowledge and implementation of union policies and procedures	✓	10%	

3	Contractual agreement	Pay membership fee	✓	100%	68%
4	Communication	Stay informed through union communication	✓	61%	64%
		Report problems	✓	58%	
		Provide feedback	✓	36%	
		Keep union up to date with personal information	✓	8%	

As mentioned previously, this study aims to determine the underlying themes associated with the proposed member-union psychological contract through identifying expectations (union obligations) and obligations (member obligations) governing the relationship, and explaining and motivating these through psychological contract theory. The next section thus motivates and explains the identified themes, with reference to psychological contract theory.

The psychological contract perspective

Rousseau's (1989:123) definition of the psychological contract, as mentioned earlier, makes reference to an individual's beliefs. These beliefs, according to Rousseau and Tijoriwala (1998:679) result from perceived inherent promises made within a relationship. This definition has predominantly been used to explain phenomena within the employer-employee relationship (Dabos & Rousseau, 2004; Millward & Herriot, 2000; Rousseau, 1989; Rousseau, 1990; Rousseau, 2000).

Turnley *et al.* (2004) determined that psychological contract breach within the employer-employee relationship can result in higher union commitment and perceptions of union instrumentality. In a recent paper, Knapp (2008) states that employees can, in fact, have divergent psychological contracts with different stakeholders within the same organisation, and that the regulation of each exchange may be quite different. The member-union psychological contract certainly has an influence on the organisation, and is, in turn, influenced by the organisation. The findings of the current study are thus a step in a new direction for the successful management of these intertwined relationships, by focusing on the expectations and obligations that govern the member-union relationship.

According to Rousseau (1990:389), at least two kinds of contracts can be identified within the employee-employer relationship: transactional and relational. The transactional contract is a public perceivable written agreement. In this study, the contractual agreement predominantly refers to the monthly membership fee (Table 2) that union members pay, in

order to enable their union to fulfil its duties. The relational contract is a subjectively understood, intrinsic contract including both mutual respective expectations and obligations of both the employee and employer. In the case of this study, the relational contractual agreement refers to the identified reciprocal expectations and obligations that govern the member-union relationship. It is suggested that all employment contracts rank on a transactional-relational continuum (Rousseau, 2000:3). According to Millward and Herriot (2000), the transactional-relational connection is not an exclusive one, rather the contractual relationship contains varying levels of both transactional and relational elements. The themes identified in this study (Table 1 and 2) support the theory of contracts containing varying levels of several divergent contracts, as there are both relational and contractual elements in the member and union obligations identified.

The relational contractual agreement between employer and employee refers in essence to the psychological contract between the employer and employee. Both are subjectively understood intrinsically, and both have individually understood perspectives on reciprocal expectations and obligations within this relationship. This study identified nine themes that constitute an intrinsic agreement between the union and its members.

In order to facilitate a better understanding and substantiate the findings of this study (for the purpose of transferability), each theme is explained and motivated through literature.

Union obligations

Union obligations constitute what members perceive they can expect from their respective unions. To determine this, respondents were asked to list up to ten expectations they have of their respective unions. After categorising the responses according to similarity, five themes associated with perceived union obligations within the member-union psychological contract were derived. In order of influence, these are:

1. legislative obligations;
2. communication;
3. union conduct;
4. training and development; and
5. supplementary services.

Legislative obligations

Legislative obligations constitute 100 percent of the members' responses of what they expect from their union, as can be seen in Table 2. All of the respondents (n=56) stated that their union has some form of legislative obligation towards them, and that they expect the union to fulfil this duty. Union officials also confirmed that the union has a legislative obligation towards their members. The predominant perceived legislative obligations that unions have towards their members, as derived from members' responses, can be observed in Table 1.

De Witte *et al.* (2008) determine that feelings of job insecurity are associated with a reduction in perceived union support and an increase in intention to resign from union membership. This was attributed to the fact that perceived job insecurity in the organisational environment, leads to perceptions that the union has neglected its obligation to protect the union member from job insecurity and dismissal. This insecurity reinforces the findings of this study that all employees perceive that their union has a legislative obligation to protect them and their interests in the workplace (Table 1). In essence, "the member needs to feel that what he or she brings into the relation is balanced by what is being offered by the union" (De Witte *et al.*, 2008:96). Perceptions of imbalance in this relationship lead to feelings of psychological contract breach in the member-union relationship, which, in turn, can result in negative consequences for the union, such as a decrease in membership numbers, loyalty, and participation.

Teachers expect their respective unions to protect them, by representing them in sectoral and national negotiations at the collective bargaining structures (in the case of the research population for this study, the Education Labour Relations Council). In addition, teachers expect representation in grievance and dispute resolution between themselves and their employer at the workplace (CCMA, 2008; Venter, 2004:183).

Employees have developed a propensity to unionise, in order to protect themselves in the organisation, a responsibility attributed to legislative obligations that the union is perceived to have towards them. All of the employees interviewed stated that their union has some form of legislative obligation towards them, which includes the expectation that their respective unions will protect them, their rights, and their interests in the workplace. These views were also supported by the views of union officials regarding perceived union obligations.

Communication

As indicated in Table 1, communication, or some form thereof, constitutes 79 percent of the members' responses of what they expect from their union. Union officials also stressed the importance of communication with their members as a contributory factor to the establishment and maintenance of a healthy relationship with their members. Table 1 further identifies the expectations that were associated with communication.

In essence, the psychological contract theory attempts to illuminate the reciprocal beliefs that govern the terms and conditions of a reciprocal exchange agreement between two or more parties (Rousseau, 1989). These beliefs constitute the reciprocal expectations and obligations within the respective relationships derived from inherent promises made (Rousseau & Tijoriwala, 1998). Promises, expectations, obligations, and basic information relevant to the needs of the parties within the relationship, need to be communicated on a regular basis, in order to ensure a healthy ongoing relationship. According to Venter (2004:444), efficient and effective "internal communication is vital to any organisation", and at the core, a union functions as an organisation in which its members have some expectations. Guest and Conway (2002) find that the explicit communication of the perceived expectations and obligations that govern the psychological contract relationship facilitates a healthy relationship, and reduces inconsistencies and feelings of psychological contract breach within the relationship. The explicit communication of intrinsic expectations within the member-union relationship will also reduce inconsistencies and perceptions of psychological contract breach and violation. Similarly, feedback is also important, as "it is this element that enables management and subordinates to identify problems and to take corrective action" (Guest & Conway, 2002:444) if required. Unions need to identify problems and inconsistencies within the relationship and take corrective action if required, in order to promote a healthy member-union psychological contract.

The member-union psychological contract constitutes a relationship in which efficient two-way communication is vital to the establishment and ongoing maintenance of well-being between the member and the union. Both the respondents and union officials interviewed felt that some form of regular communication is a vital influence in the well-being of the member-union relationship. According to Nel *et al.* (2005:329), communication "revolves around the creation of greater understanding between parties", and this transactional process is "subject to a great deal of interference, filtering and distortion, and should therefore be carefully managed". Greater understanding between union members and their union will

result in a healthier relationship and psychological contract. However, this must be attained through open, regular two-way communication between the two parties in which expectations and obligations within the relationship are also communicated, rather than through 'top-down' communication conveying information only.

Union conduct

The way in which the union conduct itself, constitutes 50 percent of the members' responses of what they expect from their respective unions, as can be seen in Table 1.

The psychological contract theory attempts to describe and measure the intrinsic reciprocal expectations and obligations within a relationship. Unmet intrinsic expectations result in psychological contract breach and violation. Breach of the psychological contract, according to Robinson (1996), is caused by a lack of perceived trust in this relationship, and will result in a reduction of employees' subsequent contributions to the relationship. Rousseau (1989:128) gives that "underlying the psychological contract is trust, which develops from a belief that contributions will be reciprocated, and that a relationship exists where actions of one party are bound to those of another". Trustworthiness and confidentiality, for example, are subcategories identified within union conduct (a main theme identified within union obligations (Table 1)), and these may suggest that feelings of non-reciprocation within the member-union relationship may also result in feelings of breach and violation of the member-union relationship. According to Rousseau (1989:128), violation of the psychological contract "subject[s] the relationship between employee and employer to a form of trauma where the factors that led to emergence of a relationship, such as trust and good faith, are undermined".

Trust, reliability, good faith, and the general way in which the union conducts itself in all its obligations, is central to the importance of the perceived union conduct obligations. Unmet expectations in this regard may result in feelings of member-union psychological contract violation, and may be detrimental to the effective functioning of the union.

Training and development

When asked what expectations they have of their respective unions, 38 percent of members indicated expectations of training and development (Table 1). Union officials also stressed the importance of the further training and development provided as a service by the

respective unions, as a means to improve and maintain competence of their members in all areas of work life.

D'Art and Turner (2006) show that the employee-employment relationship has undergone some changes since 1995, and is now characterised by a number of new features. They identified the most prominent of these “as training, education and skill development opportunities, employee involvement in decision-making or empowerment and two-way communication” (D'Art & Turner, 2006:526). The employee now plays a larger role in the new employment relationship, by contributing to organisational goals on a daily basis. Employees are also included in decisions on factors that influence them, and they are given the opportunity to develop their skills to the required standards of the organisation, in order to retain their position, or to ascend the organisation's hierarchy.

Union members indicated that unionisation is a means to develop their skills to the required standards of the organisation, in order to retain their position within the organisation. Unionisation is also seen as a way of attaining promotion within the organisation, as 38 percent of the participating union members expected that their union should provide training and development programmes to keep them up to date with changes in their occupation. Further, it is considered a means of enabling them to reach a certain level of involvement and empowerment within the organisation. This empowerment strategy may sway the balance of power within the organisation a little bit more in favour of the member, and ensure their greater influence in organisational decisions. According to D'Art and Turner (2006), job security and stability, which are important factors for employees, are not yet features of the new employment relationship. Accordingly, employees tend to rely on their collective abilities through unionisation and the threat of collective industrial action, to attain some form of job security and stability, as all of them feel that their union has the obligation to protect them and their interests in the workplace.

Conflicting interests, asymmetrical power distribution, and the commoditisation of labour (all characteristics of the traditional employment relationship) also lead to unionisation (D'Art & Turner, 2003). Employees also desire more control and influence in the workplace, as they do not often achieve this, they attempt to attain control and influence through unionisation and empowerment through training and development.

Supplementary services

Supplementary services provided by the union, constitute 29 percent of members' responses regarding the expectations they have of their respective unions (as seen in Table 1). The union officials interviewed also regard the supplementary services provided by the union as an important aspect of union member contentment. Table 1 depicts the predominant subcategories constituting the expectations members have regarding the supplementary services provided by their respective unions.

As part of union obligations, union members feel that their monthly contractual agreement, coupled with membership and participation in union activities, entitles them to some form of supplementary services provided by their respective unions. These perceived supplementary service entitlements constitute the union members' individual beliefs regarding the reciprocal member-union exchange relationship. The lack thereof may result in feelings of violation or a breach of the member-union psychological contract, as these expectations (perceived union obligations), if not met, may result in the perception of the balance in the reciprocal member-union relationship as having shifted unfavourably.

Member obligations

Member obligations constitute what union members perceive their obligations to be towards their respective unions. In order to determine this, respondents were asked to list up to ten obligations that they perceive they have towards their respective unions. After categorising the responses according to similarity, four themes associated with perceived member obligations within the member-union psychological contract were derived. In order of significance, these are:

1. union member conduct;
2. participation;
3. contractual agreement; and
4. communication.

Union member conduct

Union member conduct refers to the way in which union members conduct themselves, and constitutes 79 percent of members' responses of what they perceive their obligations towards their respective unions to be (Table 2). All the union officials interviewed, stressed that the way a union member conducts himself or herself is a reflection upon the union and can

greatly influence the influx of new members, as well as public opinion of the union. Union officials regard this as an important obligation that union members have towards the union. The predominant subcategories constituting perceived member obligations with regard to union member conduct can be seen in Table 2.

As members expect their union to conduct itself in a particular manner, they feel reciprocally obliged to conduct themselves in a particular manner, in order to convey and further a positive image of their union. Members feel that their conduct will increase the number of union members in their union, and this will in turn improve their union's influence, and increase the union's ability to support them and fulfil their requirements. According to McClendon, Wheeler, and Weikle (1998:49), "the decision to actively campaign for the union and vote for union verification is to a large extent a function of a cost-benefit calculation". This supports the psychological contract theory in which the calculation of reciprocated expectations and obligations constantly governs feelings of balance or imbalance, and even, feelings of violation and breach of contract within the relationship.

The member-union relationship constitutes a psychological contract agreement governed by certain expectations and obligations, and if these expectations and obligations are not met, it may result in feelings of psychological contract breach or psychological contract violation, which may in turn hold negative consequences for the union. The way in which the union member conducts himself or herself is an example of just such an obligation.

Participation

Participation constitutes 73 percent of members' responses regarding the perceived member obligations towards the union, and refers to participation and involvement in all union activities and meetings, union arranged training and development programs, and services provided by the union. The predominant identified subcategories with regard to participation as a union member obligation can be viewed in Table 2.

In essence, the union also functions as an organisation, which is integrated into the work environment in which the union members function. However, these union members also form part of the union, as well as the organisation in which they work. The most prominent changes in the employee-employment relationship of the modern-day organisation (D'Art & Turner, 2006:526) were also identified in this study with regard to the member-union relationship, in which union members are expected to participate in the training and

development programmes provided by their respective unions. Union members are also expected to be involved in the decision-making processes of their unions through the election of new officials as well as decision making regarding negotiations of basic conditions of employment. Member-obligations also constitute facilitative and informative two-way, open communication between union members and their respective unions.

Participation and involvement in all aspects of the union is regarded by union officials as part of a union member's obligation towards the union. This supports the members' viewpoint that they should be involved in the decisions made in their union, and participate in their union's activities.

Contractual agreement

As previously mentioned, the contractual relationship, according to Millward and Herriot (2000) and Rousseau (1990), contains elements of transactional and relational agreements. The contractual agreement between the union member and his or her respective union constitutes an agreement in which members pay a monthly membership fee, in return for some benefits from their union. The majority of members' responses (68 percent) concerning their perceived obligations towards their unions (Table 2), constitutes a transactional agreement in the form of a monthly membership fee.

De Witte *et al.* (2008) suggest that union members regard their relationship with their union as a cost-benefit relation in which they expect balanced returns in exchange for their membership fee. This notion supports this study's findings in which 68 percent of union members consider that they have a contractual agreement in the form of a monthly membership fee, for which they reciprocally expect particular services in return. This exchange relationship and underlying expectations and obligations indicate the existence of a psychological contract between the union member and his or her union.

Communication

Communication, or some form thereof, was regarded by 64 percent of respondents and all of the interviewed union officials, as an important obligation that union members have towards their respective unions. The predominant subcategories constituting communication as a member obligation can be viewed in Table 2.

Communication is essential to any successful relationship within and outside the organisation. The modern-day organisation employs an array of divergent communication

techniques, in order to regularly communicate with employees and stakeholders. This appears to hold true for the member-union relationship, in which regular communication is expected on the part of members and unions. Communication, as a member obligation, constitutes the provision of feedback to the union, as well as the regular communication of needs. The communication of expectations (perceived union obligations) is also vital to the successful management of the member-union relationship, as this will enable the union to fulfil the needs of their members, and reduce feelings of perceived psychological contract breach within the member-union relationship.

As members expect particular forms of communication and information from their union, they too feel obliged to provide their union with particular information regularly. The member-union relationship thus also functions as a form of organisation in which mutual and regular communication is needed for the existence and sustainability of the relationship. Regular communication will also ensure the well-being of the psychological contract between union and member. Guest and Conway (2002) suggest that the explicit communication of intrinsic expectations and obligations within the psychological contract may facilitate a healthier relationship. In such a relationship, both parties know exactly what is expected of them, and can accordingly attempt to fulfil these needs, and/or explicitly negotiate these obligations and expectations, in order to clarify the roles of each party involved.

The above-mentioned themes constitute union members' beliefs regarding the terms and conditions of the reciprocal exchange agreement between themselves and their union. These identified themes were supported by the views of union officials, which increases the reliability of the findings, as two divergent views from both sides of the relationship support the views within this reciprocal relationship (the psychological contract). It is further postulated that these identified themes represent the underlying, intrinsic expectations and obligations that govern the member-union psychological contract.

Summary, discussion, and possible future research

This study aims to determine the underlying themes associated with the proposed psychological contract between union members and their union, through the identification of the mutual expectations and obligations governing this relationship.

The psychological contract is accepted as comprising intrinsic expectations and obligations of both a transactional and relational degree, which govern the relationship between the two

parties involved. For this reason, two qualitative questions examining the expectations and obligations between union members and their union were posed to respondents in establishing the governing themes associated with this relationship. Union officials from recognised unions were also interviewed, in order to determine what they expect of their members. Because of the reciprocal nature of the intrinsic expectations and obligations within the psychological contract between the two parties, they were also asked what they perceive their obligations towards members to be. The answers given by union officials correspond with those of union members.

This study found that there are nine themes comprising the mutual expectations and obligations that govern the member-union relationship. These themes may aid better understanding of the underlying functioning of the relationship as well as the phenomena occurring within this relationship. Union members feel that it is the responsibility of their respective unions to provide legislative services in the form of negotiations, legal protection, individual and workplace representation, and the protection of their basic human rights. Respondents also perceived direct, two-way, frequent communication as an obligation of their union. The way the union conducts itself as well as the provision of training and development programmes and supplementary services to members were also regarded as important union obligations. These perceptions were supported by the views of union officials.

With regard to the union member obligations regarded by both respondents and union officials as important factors in the member-union relationship, the predominant themes identified are:

1. union member conduct;
2. participation in union activities;
3. frequent communication; and
4. a contractual agreement in the form of a monthly membership fee.

The nine themes identified represent mutual underlying expectations and obligations within the member-union psychological contract, and it is proposed that the condition of these themes directs the state of the member-union psychological contract. As previous research conducted by De Witte *et al.* (2008) and Turnley *et al.* (2004) has suggested, the psychological contract within the employee-employer relationship may affect the member-union psychological contract, and vice versa. Perceived, unmet expectations within the

member-union psychological contract (the five identified union obligations) may result from perceptions of breach and violation within the employee-employer relationship, and will result in negative consequences for the member-union relationship. The member-union psychological contract is reciprocal in nature as both parties involved (the union member and the union) have reciprocal expectations and obligations within this relationship. Unmet expectations from either party will result in psychological contract breach and violation, leading to a breakdown in the relationship.

In order to determine the state and extent of the psychological contract between union members and their respective unions, it is suggested that future studies apply the identified themes in the form of a quantitative psychological contract questionnaire, specifically aimed at the member-union relationship. The results of such a study might also serve as explanation for the employees' propensity to unionise, and may aid a better understanding of this phenomenon and the mechanics of the member-union relationship.

Both De Witte *et al.* (2008) and Turnley *et al.* (2004) suggest that the underlying reciprocal expectations and obligations governing the member-union relationship, the extent of these expectations and obligations, and the effects of psychological contract breach and violation on the member-union relationship, would be both interesting and beneficial for future research. This is owing to the effect that perceived psychological contract breach and violation may have on the relationship between the union member and his or her union.

In order to accomplish this, the underlying expectations and obligations governing the member-union relationship first need to be determined. Thereafter, a measuring instrument, specifically designed for measuring the proposed psychological contract between the union member and his or her union, needs to be derived from the underlying expectations and obligations. This needs to be done for the purpose of determining the state and extent of the psychological contract between the union member and his or her union.

Since the study was only conducted in one sector of industry in South Africa (the education sector), the generalisability of the findings may not be guaranteed. As all possible sources of information were exhausted and compared to the views of union officials, this paper's finding represents a holistic overview of the expectations and obligations governing the member-union relationship within the teaching sector of South Africa, and may be generalised to the wider educational sector in South Africa. It is suggested that future research attempt to reproduce this study's findings, in order to compare it with the findings of this study and

thereby ensure the generalisability, reliability, and applicability of the findings. In addition, other sectors of industry should be targeted, in order to reproduce the findings of this study and derive themes applicable to all sectors of industry, thus arriving at general themes associated with all member-union relationships in all sectors for future research.

In conclusion, this study established nine themes associated with the member-union relationship. These form five union obligations and four member obligations governing the relationship between union members and their unions. The five identified themes constituting union obligations are legislative obligations, communication, union conduct, training and development, and supplementary services. The four identified member obligations are union member conduct, participation, contractual agreement, and communication.

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CHAPTER 3: TOWARDS A MEMBER-UNION PSYCHOLOGICAL CONTRACT **MEASURE**

Chapter 3 (Article 2) has not yet been submitted for revision and publication. For this reason,
APA style referencing will continue.

ABSTRACT

This article proposes and tests a psychological contract measure specifically designed for the member-union exchange relationship. The study expands on previous research, and motivates the findings of this article through relevant literature. A high level of validity and reliability is maintained throughout the article by complying with the criteria set out by Freese and Schalk (2008) for the effective measurement of the psychological contract. The article concludes that the questionnaire compiled for this study, is in fact an accurate, reliable and valid instrument for the measurement of the Member-Union Psychological Contract, and also indicates the current emotional state of the member-union relationship in the education sector in South Africa.

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INTRODUCTION

According to De Witte, Sverke, Van Ruysseveldt, Goslinga, Chirumbolo, Hellgren, and Näswall (2008):

Employees mainly join unions to protect themselves, and protection against job insecurity and dismissal is one of the components of this motivation. Members thus enter into a type of business transaction with their union: in exchange for their financial contribution, the union must provide protection and a sufficient level of security. (p. 96)

The psychological contract, according to Robinson and Rousseau (1994), can be defined as:

An individual's belief regarding the terms and conditions of a reciprocal exchange agreement between that focal person and another party... a belief that some form of promise has been made and that the terms and conditions of the contract have been accepted by both parties (p. 246).

Accordingly, if employees perceive a breach or violation of their psychological contract within their relational agreement with their employer, they also perceive a failure in the perceived obligations of their union – and thus a breakdown in their relationship with their union – as the perception arises that their union has failed to protect them and sufficiently fulfil its duties.

Psychological contract theory traditionally focused on the employee-employer relationship, and attempted to explain phenomena, feelings, perceptions and reciprocal obligations within this relationship. Recent research have started to shift the focus of the psychological contract theory to the application in relationships other than the traditional employee-employer relationship (De Witte *et al.*, 2008; Knapp, 2008, May 28; Sverdrup, Haukedal, & Grønhaug, 2008, May 28; Turnley, Bolino, Lester, & Bloodgood, 2004). De Witte *et al.* (2008) found that perceived job insecurity within the employee-employer relationship, “can be accompanied by a reduction in perceived union support” and result in an “intention to resign membership” (p. 99). Accordingly, union members experience job security within their employee-employer relationship as a union obligation towards them and perceived job insecurity will result in feelings of member-union psychological contract violation resulting in negative consequences for the union (De Witte *et al.*).

Turnley, Bolino, Lester, and Bloodgood (2004) similarly found that “psychological contract breach is positively related to commitment to the union” (p. 421) and that “union instrumentality moderates the relationship between psychological contract breach and union commitment” (p. 421). Furthermore Knapp (2008, May 28) proposed in his research that each

individual within any organisation may have multiple psychological contracts with divergent stakeholders, rather than just one psychological contract with the organisation as previous psychological contract theory have suggested. Knapp also established that each of these exchange relationships is governed by separate, differing obligations and expectations. This research – in which employees hold differing psychological contracts with different stakeholders – was also supported by the findings of Sverdrup, Haukedal, and Grønhaug (2008, May 28) in which it was determined that managing psychological contracts within knowledge worker teams can affect the teams perceptions in a significant manner and may aid in reducing feelings of psychological contract breach, “as well as reducing the feeling of autonomy for knowledge workers” (p. 17).

The findings of Knapp (2008, May 28) and De Witte *et al.* (2008) support this paper’s initiative by suggesting the existence of divergent psychological contracts with differing stakeholders within the same organisation – specifically between the union and its members – and that the successful management of these divergent relationships and the governing expectations and obligations, may have adverse affects for the organisation as well as the union. The findings of De Witte *et al.* and Turnley, Bolino, Lester, and Bloodgood (2004) stress the importance and future possibility of applying psychological contract theory to the member-union relationship to aid in a better understanding of this relationship as well as to support the successful management thereof.

Through a preceding qualitative study, Henderson and Linde (2008) identified items that govern the relationship between the union and its members. These items constitute mutual expectations and obligations categorised respectively into union obligations (see Table 1) and member obligations (see Table 2).

Table 1: Perceived union obligations of trade union members

1	Legislative obligations	Negotiations Workplace representation Protect members’ legal and human rights Mediation Advise members Individual representation Voluntary/ Democratic industrial action Promote union power
2	Communication	Keep informed regarding union activities Personal, direct contact Answer queries

	Must be informed on labour law-related issues Frequent communication Follow up on problems handled Consult members in decisions
3 Union conduct	Speedy/Timeliness Reliability Promote interests of members Fair uniform handling Professionalism Trustworthiness/Confidentiality External interests
4 Training and Development	Member training and development Empowerment Occupational assistance
5 Supplementary services	Provide extra services and membership benefits Involvement in selection process and interviews

Source: Henderson & Linde, 2008

Table 2: Perceived obligations of trade union members to the union

1 Union member conduct	Support Loyalty Promotion React to requests Positive attitude Adhere to union requirements Professional conduct Maintain high quality work Protect union image
2 Participation	Attendance/Involvement in union activities Follow advise provided by union Know and implement union policies and procedures
3 Contractual agreement	Pay membership fee
4 Communication	Stay informed through union communication Report problems Provide feedback Keep union up to date of personal info

Source: Henderson & Linde, 2008

The purpose of this paper is to further develop the mentioned research done by Henderson and Linde (2008) – in which nine themes governing the member-union relationship was determined – by establishing whether these themes are in fact accurate predictors of both union obligations and member obligations, respectively, within the member-union relationship, and by measuring the state of the current member-union psychological contract as well as the emotions involved in such a relationship within the designated research population. Thus this paper will put forth the first known instrument to measure the Member-

Union Psychological Contract by determining whether the identified union and member obligations (Henderson & Linde) are valid, and by determining the current state of the member-union psychological contract in the primary and secondary education sector in South Africa. In order to do this, relevant and current psychological contract literature needs to be reviewed, in order to compile an inclusive and accurate instrument for the measurement of the psychological contract between union member and the union.

LITERATURE REVIEW

As psychological contract theory has evolved through numerous studies, as well as the measurement thereof. The results include several developed and tested instruments for the measurement of the relationship between employee and employer. In this paper the focus moves from the traditional employee-employer relationship approach, to the relationship between union member and union; the reason for this being the immense traditional influence that trade unions have on the employee-employer relationships and the organisation in general.

As more and more psychological contract instruments have been developed through research over the years, studies have been assessing the validity, reliability and application of these divergent instruments. Rousseau and Tijoriwala (1998) proposed three types of assessments of psychological contract measures – content, feature, and evaluation – which have been employed in psychological contract and related research. Denise Rousseau's (2000) Psychological Contract Inventory, was designed to serve two basic purposes:

- 1) "as a psychometrically sound tool for assessing the generalizable content of the psychological contract for use in organisational research, and
- 2) as a self-scoring assessment to support executive and professional education" (p. 1).

Conway and Briner (2005) identified thirteen psychological contract measures, measuring the content, breach/fulfilment, and violation of the psychological contract – this includes three instruments measuring employer's perspectives.

Recently, Freese and Schalk (2008) published an article which analysed and critically reviewed different psychological contract measurement instruments, and proposed the most encompassing, valid and reliable measures for application in future psychological contract research. They proposed six criterion for measuring the content and evaluation of the

psychological contract “based on the general principles for assessing content and construct validity for scale development in psychological measurement” (Freese & Schalk, p. 272).

These six criteria, as proposed by Freese and Schalk, are:

Criterion 1: A psychological contract measurement has to be theory-based or inductively developed (content as well as evaluation measures);

Criterion 2: A psychological contract measurement should assess mutual obligations/promises (construct validity of content and evaluation measures);

Criterion 3: The psychometric properties of the psychological contract measurement and the appropriateness for the sample have to be assessed (content validity of content and evaluation measures);

Criterion 4: The evaluation of the psychological contract has to be assessed for separate items. Global measures of fulfilment or violation have to consist of multiple items to ensure the reliability of the measure (content validity of evaluation measurements);

Criterion 5: In the evaluation of the psychological contract it should be assessed whether a certain item is important. In addition, the evaluation should be direct (construct validity of evaluation measures);

Criterion 6: Violation of the psychological contract has to be distinguished from fulfilment, and from contract breach (construct validity of evaluation measures).

This article and the questionnaire proposed for the measurement of the Member-Union psychological contract are based on, and fulfil these six criteria to ensure the validity, reliability and applicability of the proposed instrument. Freese and Schalk (2008), through critical evaluation of different psychological contract measurement instruments, proposed the most ideal measurements – which fulfil the six criteria – at the end of their study. According to Freese and Schalk four “measurements emerged as ‘recommended’ measurements from the analysis” (p. 281). These were: Freese and Schalk (1997); Psycones (Psycones, 2005); and Rousseau (both 1990 and 2000). The development of the member-union psychological contract questionnaire was based on the Psycones questionnaire format, since it was singled out by Freese and Schalk as currently the most applicable measure in psychological contract studies.

OBJECTIVES OF STUDY

This article has one main goal, which is to propose and test a measure for the member-union psychological contract. To achieve this, two intertwined objectives need to be achieved:

1. The first is to determine whether the themes identified by Henderson and Linde (2008) governing the member-union psychological contract – comprising mutual expectations and obligations – are in fact accurate predictors of the member-union psychological contract, by focussing on the union obligations and member obligations respectively.
2. Secondly, this article will attempt to determine the contractual contents and state of the member-union relationship, as well as the emotional experience thereof.

This will be achieved through a statistical analysis of four separate, but complimentary factors: Union obligations, Member obligations, Emotions concerning the psychological contract, and the State of the member-union psychological contract.

RESEARCH DESIGN AND PROCEDURE

Permission to conduct research at schools in the North West Province as well as a list of schools in this province was obtained from the South African Department of Education. Cluster sampling was used in which sampling units (schools) were selected at random and all respondents (teachers) within each school were given a questionnaire to complete (Struwig & Stead, 2001). In total, the study comprises a sample of 200 teachers from eight schools in the North West Province in South Africa. A random starting point on the list of schools obtained from the South African Department of Education was selected, after which every third school's principle was contacted to arrange for all their teachers to complete the questionnaire. The study's goal was explained to each principle, and each school was visited with the questionnaires being distributed to all of the teachers employed at each school. The questionnaires were then picked up in three days' time, to ensure that the respondents had ample time to complete the questionnaires.

Each respondent received a questionnaire explaining the goal of the research and was assured anonymity. Respondents were then asked to complete a questionnaire comprising five sections: biographical information (5 items), union obligations (30 items), member obligations (22 items), emotions concerning the psychological contract (6 items), and the state of the psychological contract (8 items). Of the 200 questionnaires given out, 111 complete questionnaires were returned.

The characteristics of the respondents, as derived from their biographical information section obtained by the questionnaire, were set out in Table 3.

Table 3: Participant Characteristics

Item	Category	Frequency	Percentage
Gender	Male	24	21.6%
	Female	85	76.6%
	<i>Missing values</i>	2	<i>1.8%</i>
Age	26-32	8	7.2%
	33-39	35	31.5%
	40-46	30	27%
	47-55	26	23.4%
	56-62	8	7.2%
	<i>Missing values</i>	4	<i>3.6%</i>
Race	African	49	44.1%
	Coloured	3	2.7%
	Indian	3	2.7%
	White	54	48.6%
	<i>Missing values</i>	2	<i>1.8%</i>
Marital status	Single	27	24.3%
	Married	62	55.9%
	Divorced	13	11.7%
	Widowed	5	4.5%
	<i>Missing values</i>	4	<i>3.6%</i>

Of the respondents, 21.6% were male and 76.6% were female; 44.1% were African, 2.7% Coloured, 2.7% Indian, and 48.6% White. The mean age of respondents was approximately 43 years. All respondents have membership to one of the unions recognised by the ELRC as educator unions (Education Labour Relations Council; ELRC, 2008). The Education Labour Relations Council (ELRC) is a bargaining council specifically for employees in the education sector in South Africa.

Questionnaire design

The application of the psychological contract theory to the member-union relationship is innovative in nature, and a current measuring instrument specifically designed to measure this relationship, did not exist. For this reason, a questionnaire was needed to be compiled to reach the objectives of this article. This questionnaire that was developed (named the Member-Union Psychological Contract questionnaire) was based on the Psycones Psychological Contract questionnaire (Psycones, 2005), which is a critically reviewed, and recommended psychological contract measurement, according to Freese and Schalk (2008). This Member-Union Psychological Contract questionnaire fulfils all the set criteria for an

effective and inclusive psychological contract measurement, as established by Freese and Schalk.

The questions used in the questionnaire were based on the nine themes identified by Henderson and Linde (2008) as indicated in Tables 1 and 2, which govern the member-union relationship between teachers and their respective unions and comprise reciprocal member and union obligations within this relationship – this constitutes the content of the member-union psychological contract (see Tables 1 and 2). Henderson and Linde determined these themes through a qualitative open-ended questionnaire, and each theme comprised subcategories substantiating and contributing to the over-all identified themes. According to Freese and Schalk (2008) any “instrument to measure the content and evaluation of the psychological contract should be grounded in theory or be based on a thorough inductive analysis of empirical data” (p. 273) – which is exactly what Henderson and Linde did to determine these governing themes. These themes aided in reaching the first objective of this paper, which was to measure the content of the member-union psychological contract, through the utilisation of the nine themes identified by Henderson and Linde. The nine themes governing the member-union psychological contract, as identified by Henderson and Linde comprised mutual obligations: union obligations – legislative obligations, communication, union conduct, training and development, and supplementary services; and member obligations – union member conduct, participation, contractual agreement, and communication. These themes were incorporated into two of the four factors that the constructed member-union questionnaire measures, namely union obligations, and member obligations. An example of the questionnaire utilised to reach the objectives of this article can be observed in Appendix 1.¹

The following two factors – Emotions concerning the psychological contract, as well as the State of the psychological contract – were derived from the Psycones measure (Psycones, 2005), and the questions were adapted accordingly, to suite the objectives, research population as well as this paper’s research paradigm. These sections aided in reaching the second objective of this article, which was to determine the current emotional state of the member-union relationship, as well as the current state of the member-union psychological contract.

¹ Correspondence before the use of this questionnaire will be appreciated as it builds on current and future research done by Think!Well: Economic Value of Wellness Research and the North-West University, South Africa.

The questionnaire is based on previous research within the same specific sample as Henderson and Linde (2008), and for this reason, a pilot study was not necessitated (Freese & Schalk, 2008).

FINDINGS

The content of the psychological contract refers to the degree to which mutual, perceived obligations/promises between the union member and the union have been kept. Perceived unmet obligations result in breach of psychological contract, and can have detrimental effects on the member-union relationship.

The emotions concerning the psychological contract, as well as the state of the psychological contract indicate perceptions of violation within the member-union relationship. According to Freese and Schalk (2008) to establish psychological contract fulfilment or violation at the item level, either a direct or indirect measure is used. This article utilises a direct measure in which “the respondent assess the extent to which the perceived obligations are met” (Freese & Schalk, p. 279).

Content of member-union psychological contract

Factor 1: Union obligations – Respondents were asked to indicate whether the stated union obligation have been made to them, as well as the degree to which they believe that their union have fulfilled the stated obligation on a 5-point scale ranging from 1 = *Yes, but promise not kept at all* to 5 = *Yes, promise entirely kept* – 0 = *No* was added to measure whether the specific promise have been made to the respondent or not, as well as the contents and state thereof. Cronbach’s alpha coefficient (α) for this factor was 0.96. According to Field and Hole (2003) a “value of 0.8 is seen as an acceptable value for Cronbach’s alpha; values substantially lower indicate an unreliable scale” (p. 48). Accordingly, the following measured themes and subcategories (as can be seen in Table 4), was indicated as union obligations, and supports the findings of Henderson and Linde (2008).

Table 4: Frequencies and descriptive statistics of the Union Obligations

Item	NO						YES		Absent Values (%)	Mean	Standard Deviation (SD)
	0	1	2	3	4	5					
	%	%	%	%	%	%					
<u>Theme 1: Communication</u>											
1	Keep informed regarding union	2.7	1.8	12.6	10.8	48.6	23.4	0	3.71	1.171	
2	activities	3.6	2.7	7.2	16.2	41.4	28.8	0	3.76	1.230	

3	Must be informed on labour law-related issues	2.7	5.4	8.1	19.8	36.9	25.2	1.8	3.61	1.261
4	Personal, direct contact	5.4	6.3	12.6	22.5	38.7	12.6	1.8	3.23	1.324
5	Frequent communication	3.6	3.6	15.3	19.8	38.7	18.0	0.9	3.42	1.259
6	Follow up on problems handled	2.7	1.8	17.1	28.8	32.4	14.4	2.7	3.33	1.152
7	Consult members in decisions	2.7	5.4	11.7	25.2	37.8	15.3	1.8	3.39	1.209
8		5.4	6.3	11.7	28.8	35.1	10.8	1.8	3.17	1.288
<u>Theme 2: Legislative obligations</u>										
9	Negotiations	1.8	4.5	4.5	18.9	35.1	34.2	0.9	3.85	1.187
10	Advise members	1.8	3.6	9.0	18.9	45.9	18.9	1.8	3.63	1.119
11	Protect members' legal and	1.8	3.6	6.3	18.0	42.3	27.0	0.9	3.78	1.136
12	human rights	1.8	2.7	7.2	16.2	39.6	30.6	1.8	3.84	1.140
13	Individual representation	3.6	4.5	7.2	23.4	39.6	19.8	1.8	3.53	1.237
14	Voluntary/Democratic industrial	2.7	2.7	9.0	18.9	38.7	24.3	3.6	3.67	1.196
15	action	22.5	8.1	13.5	16.2	22.5	9.0	8.1	2.38	1.729
16	Individual representation	5.4	5.4	10.8	23.4	33.3	18.9	2.7	3.34	1.361
17	Workplace representation	3.6	4.5	6.3	20.7	37.8	22.5	4.5	3.59	1.263
18	Promote union power	3.6	2.7	8.1	22.5	36.0	22.5	4.5	3.59	1.233
<u>Theme 3: Union conduct</u>										
19	Speedy/Timeliness	2.7	4.5	11.7	28.8	32.4	16.2	3.6	3.37	1.202
20	Reliability	1.8	1.8	9.0	26.1	38.7	21.6	0.9	3.65	1.089
21	Promote interests of members	2.7	3.6	9.9	21.6	39.6	21.6	0.9	3.58	1.199
22	Fair, uniform handling	2.7	8.1	8.1	18.0	42.3	20.7	0	3.51	1.285
23	Professionalism	2.7	2.7	6.3	9.9	45.0	32.4	0.9	3.91	1.170
24	Trustworthiness/Confidentiality	4.5	7.2	3.6	16.2	37.8	30.6	0	3.68	1.376
25	External interests	9.0	4.5	7.2	15.3	41.4	20.7	1.8	3.40	1.485
<u>Theme 4: Training and development</u>										
26	Member training and development	14.4	4.5	11.7	21.6	27.0	18.9	1.8	3.01	1.641
27	Empowerment	9.9	4.5	16.2	17.1	34.2	16.2	1.8	3.12	1.508
28	Occupational assistance	10.8	6.3	9.0	30.6	28.8	13.5	0.9	3.02	1.478
<u>Theme 5: Supplementary services</u>										
29	Provide extra services and membership benefits	9.9	6.3	7.2	24.3	34.2	18.0	0	3.21	1.502
30	Involvement in selection process and interviews	4.5	3.6	14.4	16.2	34.2	26.1	0.9	3.52	1.360

Note. Table 4 represents percentages of responses in each column (before missing values was replaced).

As can be seen in Table 4, all of the items (comprising sub-categories) identified by Henderson and Linde (2008) were confirmed as accurate promises and member expectations, and comprise perceived promises made by unions to members. Responses representing 0 = *No*, comprise less than 14.4% in all categories (with the exception of question 15: "*To participate in unprotected (illegal) industrial action*"), which indicates that respondents definitely feel that such a promise has been made to them. The mean in each question and theme are above 3 indicating that respondents strongly feel that such a promise has been made, but not entirely kept.

Factor 2: Member obligations – Respondents were asked to indicate whether they have promised or committed themselves to fulfil the stated member obligations, as well as the degree to which they believe that they have kept these promises on a 5-point scale ranging from 1 = *Yes, but promise not kept at all*, to 5 = *Yes, promise entirely kept* – 0 = *No* was added to measure whether the specific promise have been made to the respondent or not. Cronbach's alpha coefficient (α) for this factor was 0.96. Accordingly, the following measured themes and subcategories (as can be seen in Table 5), was indicated as member obligations, and supports the findings of Henderson and Linde (2008).

Table 5: Frequencies and descriptive statistics of Member obligations

Item		NO		YES				Absent Values (%)	Mean	Standard Deviation (SD)
		0 %	1 %	2 %	3 %	4 %	5 %			
<u>Theme 1: Communication</u>										
1	Report problems	16.2	6.3	11.7	19.8	36.9	9.0	0	2.82	1.597
2	Stay informed through union	5.4	3.6	13.5	26.1	38.7	12.6	0	3.27	1.265
3	communication	5.4	2.7	14.4	18.9	41.4	17.1	0	3.40	1.302
4	Provide feedback	13.5	5.4	14.4	18.0	26.1	18.9	3.6	2.98	1.648
5	Keep union up to date of personal info	16.2	5.4	14.4	16.2	26.1	18.9	2.7	2.90	1.713
<u>Theme 2: Union member conduct</u>										
6	Positive attitude	5.4	3.6	12.6	10.8	35.1	30.6	1.8	3.61	1.420
7	React to requests	3.6	5.4	6.3	16.2	42.3	25.2	0.9	3.65	1.281
8	Support	1.8	2.7	9.9	7.2	44.1	32.4	1.8	3.90	1.162
9	Loyalty	1.8	3.6	9.0	10.8	38.7	35.1	0.9	3.88	1.202
10	Promotion	3.6	2.7	9.0	12.6	36.0	34.2	1.8	3.81	1.287
11	Protect union image	2.7	3.6	9.0	11.7	37.8	34.2	0.9	3.83	1.255
12	Adhere to union requirements	1.8	2.7	7.2	16.2	37.8	29.7	4.5	3.83	1.150
13	Professional conduct	1.8	1.8	5.4	7.2	36.0	45.9	1.8	4.16	1.099
14	Maintain high quality work	0.9		4.5	8.1	42.3	40.5	3.6	4.21	0.898
<u>Theme 3: Participation</u>										
15	Participate in union actions	8.1	4.5	9.0	11.7	35.1	30.6	0.9	3.55	1.524
16		45.9	13.5	9.9	9.0	13.5	6.3	1.8	1.49	1.730
17	Attendance/Involvement in union activities	17.1	3.6	16.2	21.6	26.1	15.3	0	2.82	1.647
18		9.9	4.5	16.2	15.3	30.6	23.4	0	3.23	1.565
19		5.4	3.6	11.7	22.5	36.9	17.1	2.7	3.37	1.316
20	Follow advise provided by union	2.7	5.4	6.3	12.6	52.3	20.7	0	3.68	1.191
21	Know and implement union policies and procedures	3.6	1.8	9.9	14.4	45.0	25.2	0	3.71	1.209
<u>Theme 4: Contractual agreement</u>										
22	Pay membership fee	0.9	1.8	5.4	1.8	9.9	77.5	2.7	4.57	1.016

Note. Question 16 ("Participate in unprotected (illegal) union actions?") was further excluded from the study's findings as its factor analysis showed that it was not a perceived promise made by union members (0 = 45.9%) and further discussion will focus on perceived promises made. Table 5 represents percentages of responses in each column (before missing values was replaced).

As can be seen in Table 5, all of the items (comprising sub-categories) identified by Henderson and Linde (2008) are accurate predictors of what union members perceive their obligations towards their respective unions are, and comprise intrinsic promises made to their unions. Responses representing 0 = *No*, comprise less than 17.1% in all categories (with the exception of question 16: “*Participate in unprotected (illegal) union actions?*”) indicating a strong perception that such an obligation towards the union exists amongst union members. The mean each question and theme is predominantly above 3, also indicating that respondents strongly feel that such an obligation exists, although not entirely kept on their part.

Factor 3: Emotions concerning member-union psychological contract

Respondents were asked to indicate their overall feelings with regards to how far their union has or has not kept its promises on a 5-point scale ranging from 1 = *Strongly disagree* to 5 = *Strongly agree*. Cronbach’s alpha coefficient (α) for this factor was 0.81.

Table 6: Frequencies and descriptive statistics of Emotions concerning the psychological contract

Item	1	2	3	4	5	Absent Values (%)	Mean	Standard Deviation (SD)
	%	%	%	%	%			
1 Happy	7.2	8.2	15.5	33.0	28.9	7.2	3.73	1.094
2 Not angry	5.2	6.2	19.6	18.6	38.1	12.4	3.89	1.062
3 Pleased	6.2	6.2	23.7	24.7	27.8	11.3	3.70	1.045
4 Not violated	6.2	8.2	13.4	11.3	47.4	13.4	3.99	1.148
5 Not disappointed	9.3	13.4	17.5	15.5	33.0	11.3	3.56	1.226
6 Grateful	7.2	4.1	20.6	30.9	27.8	9.3	3.75	1.047

Note. Table 6 represents Series Mean percentages of responses in each column (after missing values have been replaced). The number of respondents for this factor has been reduced to 97 as not all respondents completed this section, and for reliability and validity reasons, those who did not complete the section were excluded from the factor analysis

As can be seen in Table 6, the current emotional state and well-being of the Member-Union relationship is high and feelings of violation of psychological contract thus low as the predominant amount of responses measured under 5 = *Strongly agree* representing a positive attitude regarding the current member-union relationship. The mean of all emotions measured above 3, but below 4, suggesting a relatively positive emotional state of the relationship, but leaves room for improvement.

Factor 4: State of the member-union psychological contract

Respondents were asked to indicate their feelings and perceptions with regards to the wellbeing of their current relationship with their union – in accordance with the questions

coefficient according to Field and Hole (2003). Union and member obligations, as identified by Henderson and Linde (2008) was supported by the findings of this study as both factors (union obligations and member obligations) had a Cronbach's alpha coefficient (α) of 0.96, and are thus accurate predictors of the member-union psychological contract. The current emotions involved in the member-union psychological contract as well as the state of the psychological contract are positive as indicated and explained by the frequency of responses in Table 6 and 7.

According to Robinson and Morrison (2000) psychological contract breach encompass the feeling or perception "that one's organisation has failed to meet one or more obligations within one's psychological contract in a manner commensurate with one's contributions", while feelings or perceptions of psychological contract violation encompasses "the emotional and affective state that may under certain conditions follow from the belief that one's organisation has failed to adequately maintain the psychological contract" (p. 230). Both psychological contract violation and breach can have a detrimental effect on the relationship between member and union, and further exploration of the underlying workings of this relationship will help to ensure that this relationship has the means to accomplish and maintain wellbeing. Employees in the education sector in South Africa feel relatively content with the state of their relationship with their union as they have indicated that they perceive relatively positive emotions concerning their relationship with their respective unions, as well as an overall positive state of the relationship. Accordingly, employees perceive that their unions have relatively succeeded in maintaining the psychological contract and perceived feelings of violation is thus low. The emotions concerning the member-union relationship (as indicated by Table 6) are high with the predominant response being "*Strongly agree*". The current state of the member-union relationship is a little lower, with the predominant response being four (as can be seen in Table 7), indicating that respondents aren't entirely content with the current degree to which their expectations within their respective unions have been met – leaving room for improvement.

As stated above, the emotional and psychological state of the current member-union relationship is relatively positive, but improvement is still possible. The proposed and tested Member-Union Psychological Contract questionnaire (Appendix 1) opens vast doors in the assessment of the member-union exchange relationship. Unmet expectations and obligations within this relationship, lead to a breakdown in the psychological state of the relationship. In

asked in this section – on a 5-point scale ranging from 1 = *Not at all* to 5 = *Totally*. Cronbach's alpha coefficient (α) for this factor was 0.92.

Table 7: Frequencies and Descriptive statistics of the State of the psychological contract

Item	1	2	3	4	5	Absent Values (%)	Mean	Standard Deviation (SD)
Question D 1	5.2	10.3	18.6	39.2	26.8	0	3.73	1.058
Question D 2	2.1	13.4	19.6	39.2	25.8	0	3.74	0.994
Question D 3	4.1	11.3	25.8	44.3	13.4	1.0	3.52	0.934
Question D 4	5.2	13.4	20.6	49.5	11.3	0	3.48	0.964
Question D 5	4.1	11.3	21.6	41.2	21.6	0	3.65	1.000
Question D 6	10.3	19.6	21.6	36.1	11.3	1.0	3.19	1.106
Question D 7	8.2	15.5	23.7	38.1	14.4	0	3.35	1.079
Question D 8	10.3	20.6	21.6	36.1	11.3	0	3.18	1.112

Note. Table 7 represents Series Mean percentages of responses in each column (after missing values have been replaced). The number of respondents for this factor has been reduced to 97 as not all respondents completed this section, and for reliability and validity reasons, those who did not complete the section were excluded from the factor analysis

As can be seen in Table 7, the current State of the Member-Union Psychological Contract, according to the frequency of responses, lies at 4 (between 1 = *Not at all*, and 5 = *Totally*), and represents a positive state with regards to the union fulfilling its perceived duties. The positive state of the member-union psychological contract indicates low levels of perceived psychological contract violation. Once again, the mean lies above 3, but below 4, suggesting a relatively healthy state of the member-union relationship, but also – as is the case with the emotional state – leaves room for improvement.

CONCLUSION AND SUGGESTIONS FOR FUTURE RESEARCH

Themes identified by Henderson and Linde (2008) which govern the member-union relationship, were used to measure the content of the member-union psychological contract, as well as the state of the psychological contract. The course of this article adheres to the six criterion set out by Freese and Schalk (2008) for the successful measurement of the psychological contract, and thus contributes to the validity and reliability of the findings of this study.

The questionnaire compiled to measure the member-union psychological contract comprises four factors/sections: Union obligations, member obligations, emotions concerning the psychological contract, and the state of the psychological contract. Each of these factors had a Cronbach's alpha coefficient (α) above 0.81, with three of the factors above 0.92, indicating a very high reliability rate of the findings and is acceptable values for the Cronbach's alpha

order for unions to better understand their perceived, attributed obligations towards their members as well as the needs of their members, a similar research approach can be applied in future research in order to assess whether the union fulfils its duties and to what extent. This type of research can be done by unions themselves in order to assess the current state of the relationship that they have with their members, as well as to identify possible areas in which it can be improved. Both De Witte *et al.* (2008) and Turnley *et al.* (2008) concluded in their research that the member-union and employee-employer relationship have an influence on each other, with specific regards to union commitment, job security, union support, as well as intentions to resign union membership. Applying the proposed questionnaire in this paper to the member-union relationship and by comparing the results to that of the psychological contract between employee and employer, phenomena within both relationships may be better explained and understood as these two relationships have a definite influence on each other. For example, a decrease in union membership (or increase in intention to resign union membership) may be explained by an increase in the wellbeing of the relationship between employee and employer – as they might in this hypothetical instance perceive their union as less instrumental and a lesser need for it might exist. Also understanding the relationship and needs governing the relationship between the union and its members, may highly benefit the organisation. Unions may utilise this type of measure in order to better understand their obligations to their members, as well as to determine to what extent these obligations have been fulfilled and which of them needs more attention in order to increase the wellbeing of their relationship with their members.

This article set out to measure the member-union psychological contract by building on previous research done by Henderson and Linde (2008) and fulfilled its objectives by compiling a member-union psychological contract questionnaire which is an accurate predictor of the current emotional and psychological state of the member-union relationship – as proven through thorough statistical analysis of empirical data obtained.

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APPENDIX 1 – THE MEMBER-UNION PSYCHOLOGICAL CONTRACT QUESTIONNAIRE

Member-Union Psychological Contract Questionnaire

This questionnaire forms part of a study attempting to determine the psychological contract and the state thereof between union-members and their respective unions.

The content of this booklet will be kept anonymous, and there is thus no need to fill in your personal details anywhere. The questionnaire consists of 66 items, each of which you have to complete on a scale of 0 to 5, by marking your applicable answer with an X into the relevant box.

Please complete the questionnaire as honestly as possible. Start with the "BIOGRAPHICAL INFORMATION" below, followed by the sections marked: "UNION OBLIGATIONS", "MEMBER OBLIGATIONS", "EMOTIONS CONCERNING PSYCHOLOGICAL CONTRACT", and "STATE OF THE PSYCHOLOGICAL CONTRACT".

Thank you very much for your time and participation!

BIOGRAPHICAL INFORMATION

- 1 Gender ☐ Male ☐ Female
- 2 Age
- 3 Race ☐ African ☐ Coloured ☐ Indian ☐ White
- 4 Marital status ☐ Single ☐ Married ☐ Divorced ☐ Widowed
- 5 Union membership ☐ NAPTOSA ☐ NATU ☐ SADTU ☐ SAOU ☐ Other

Question number	Question	Type X into the most-applicable box					
		0	1	2	3	4	5
A	UNION OBLIGATIONS: Below follows a list of some promises and commitments that unions sometimes make to their members. For each, I would like you to consider whether such a promise has been made by your union, either formally or informally, and the extent to which it has been fulfilled.	No	Yes, but promise not kept at all	Yes, but promise only kept a little	Yes, but promise half kept	Yes, promise largely kept	Yes, promise entirely kept
1	To keep you informed with regard to union activities, meetings and decisions.						
2	To keep you informed with regard to negotiations relevant to your occupation.						
3	To answer any labour-related questions.						
4	To provide personal, direct contact with union officials.						
5	To provide union-related information on a frequent basis.						
6	To follow-up on problems handled.						
7	To consult you with regard to decisions pertaining to negotiations.						
8	To consult you with regard to decisions within the union itself.						
9	To negotiate on your behalf for better conditions of service.						
10	To advise you in any legislative and occupational matters.						
11	To protect your human rights.						
12	To protect your occupation.						
13	To provide labour law assistance and representation.						
14	To participate in protected (legal) industrial action.						
15	To participate in unprotected (illegal) industrial action.						
16	To mediate grievances between yourself and your school.						
17	To mediate disputes between yourself and the Department of Education.						
18	To promote union influence.						

19	To handle problems in a speedy and timely fashion.						
20	To be reliable and stand behind its members.						
21	To promote the collective and individual interests of their members.						
22	To treat all members in a fair and uniform manner.						
23	To conduct itself in a professional manner.						
24	To handle problems with confidentiality and remain trustworthy.						
25	To promote certain external interests, e.g. HIV/AIDS programmes.						
26	To provide personal training and development programmes.						
27	To assist in the empowerment of members.						
28	To provide academic and occupational assistance.						
29	To provide extra services and membership benefits.						
30	To be involved in the selection and interview process of employees in your organisation.						

You are welcome to make further comments on the union's obligations to you as a member

Question number	Question	Type X into the most-applicable box					
B	MEMBER OBLIGATIONS: The following list consists of some promises and commitments that members sometimes make to their union. For each, I would like you to consider whether you have made such a promise to your union, either formally or informally, and the extent to which it has been fulfilled. Have you promised or committed yourself to...	0	1	2	3	4	5
		No	Yes, but promise not kept at all	Yes, but promise only kept a little	Yes, but promise half kept	Yes, promise largely kept	Yes, promise entirely kept
1	Report work-related problems to your union?						
2	Stay informed with regard to your union's activities and meetings?						
3	Stay informed with regard to changes in your occupation?						
4	Provide feedback to your union?						
5	Keep your union up to date with your personal information?						
6	Exert a positive attitude towards your union?						
7	Respond to union requests?						
8	Support your union?						
9	Be loyal to your union?						
10	Promote your union?						
11	Protect the views and constitution of your union?						
12	Adhere to union requirements?						
13	Maintain professional conduct in your occupation?						
14	Maintain a high quality of work in your occupation?						
15	Participate in protected (legal) union actions?						
16	Participate in unprotected (illegal) union actions?						
17	Attend union meetings?						
18	Attend union-arranged workshops?						
19	Utilise services provided by your union?						
20	Follow recommendations provided by your union?						
21	Know and implement new policies and procedures adopted by your union?						
22	Pay your monthly membership fee?						

You are welcome to make further comments on your member obligations towards your union

Question number	Question	Type X into the most-applicable box				
C	EMOTIONS CONCERNING PSYCHOLOGICAL CONTRACT: Looking overall at how far your union has or has not kept its promises and commitments, to what extent do you agree with the following statements? I feel...	1	2	3	4	5
		Strongly disagree	Disagree somewhat	Neither agree nor disagree	Agree somewhat	Strongly agree
1	happy?					
2	not angry?					
3	pleased?					
4	not violated?					
5	not disappointed?					
6	grateful?					

You are welcome to make further comments on your emotions concerning your relationship with your union

Question number	Question	Type X into the most-applicable box				
D	STATE OF THE PSYCHOLOGICAL CONTRACT: Please answer the following questions.	1	2	3	4	5
		Not at all				Totally
1	Overall, do you feel that your union has the ability to sufficiently protect you and your rights?					
2	To what extent do you trust your union to look after your best interests?					
3	Do you feel that changes in the union are implemented fairly?					
4	In general, how much do you trust your union to keep its promises or commitments to you and other members?					
5	Do you feel like your union treats you fairly?					
6	Do you feel that the union sufficiently provides in your training and development needs?					
7	In general, does your union conduct themselves as you would expect them too?					
8	Overall, would you say that the communication between yourself and your union is sufficient at present?					

Your are welcome to make further comments on the state of your psychological contract

CHAPTER 4 – DISCUSSION, CONCLUSION, LIMITATIONS AND SUGGESTIONS
FOR FUTURE RESEARCH

INTRODUCTION

Traditional the psychological contract research focused on the employee-employer relationship, developing numerous instruments to measure and determine the perceived underlying feelings and obligations that both the employee and employer has in regards to each other in the reciprocal relationship. Psychological contract research has recently shifted its traditional approach from this employee-employer relationship, since more research begun to entertain and explore the notion of an existence of a psychological contract between other organisational-influential parties (De Witte *et al.*, 2008; Knapp, 2008, May 28; Sverdrup, Haukedal, & Grønhaug, 2008, May 28; Turnley, Bolino, Lester, & Bloodgood, 2004). This study set out to propose, develop and test the first known psychological contract measure specifically designed for the member-union relationship.

Freese and Schalk (2008) recently published an article in which they critically reviewed and evaluated current psychological contract measures, while also focussing on the best techniques to compile such measures in order to ensure reliability and validity of the findings in the application of such a measure.

The study commenced by drawing a sample from the research population in order to identify governing themes prominent to the member-union relationship through a qualitative means, and was continued until the identification of original items were exhausted. These themes were then utilised to compile a questionnaire specifically designed to measure the member-union psychological contract – the questionnaire was based on the critically reviewed Psycones (2005) questionnaire and the themes identified in article one utilised to formulate questions for this questionnaire. This procedure fulfils the criteria set out by Freese and Schalk (2008) for the effective compilation of a psychological contract measure, and adds to the studies validity and reliability of the findings.

DISCUSSION

This study comprises two separate, but complimentary articles attributing to the main focus of this study, which was to investigate the member-union psychological contract. In order to do this, the specific objectives were reached as follows:

Objective 1 (Article 1)

The first objective of this study was to investigate the contents of the member-union psychological contract. In order to do this, researchable themes (or items) needed to be identified. This was accomplished through a qualitative means in which respondents had to

complete a qualitative questionnaire from which the researchable themes were identified, and then substantiated through relevant literature – an example of the questionnaire used can be viewed in Addendum 3. The paper identified nine themes comprising mutual expectations and obligations that govern the member-union relationship. These identified themes were:

- a) Union obligations – Legislative obligations, communication, union conduct, training and development, and supplementary services. In each case, respondents felt that it is the responsibility of their respective unions to sufficiently provide and adhere to each of the mentioned obligations in order to establish and maintain a level of wellbeing in their individual member-union relationships.
- b) Member obligations – Union member conduct, participation, contractual agreement, and communication. Union members felt that they have some obligations towards their union as well. These items identified as member obligations, are perceived by union members as the predominant obligations that they have towards their respective unions in order to establish and maintain a level of wellbeing within their individual member-union relationships.

These items were identified as being the predominant mutual expectations and obligations within the member-union relationship as identified by the respondents/union members, and correspond with the views of union officials. Each item comprises subcategories supporting each theme.

The nine themes identified in this article, represent mutual underlying expectations and obligations within the member-union psychological contract, and it is proposed that the perceived condition of these themes direct the state of the member-union relationship.

Objective 2 (Article 2)

The second objective of this study was to investigate the expectations and obligations associated with the member-union psychological contract. This was accomplished by developing a quantitative measure based on the items identified in article one to measure the psychological contract. Respondents were given the opportunity in each question to state whether they agree with each statement in the questionnaire (representing an identified item) as well as the degree to which they agree with it. This allowed the paper to indicate which of the identified items, are in fact valid predictors of mutual expectations and obligations within the member-union relationship. By measuring the degree an agreement with each

statement/question in the questionnaire, the member-union psychological contract could also be measured.

The findings of the paper confirm that all the themes identified in article one, are in fact valid predictors of the member-union psychological contract as the predominant frequency of responses indicates it as legitimate expectations or obligations.

The questionnaire utilised to reach the objectives of this article is based on the Psycones (2005) questionnaire. The questionnaire was compiled to measure the member-union psychological contract and comprise four factors/sections: Union obligations, member obligations, emotions concerning the psychological contract, and the state of the psychological contract. Each of these factors had a Cronbach Alpha (α) above 0.81, with three of the factors above 0.92 indicating a very high reliability and validity rate of the findings – these are acceptable values for a Cronbach alpha according to Field and Hole (2003).

Each of the nine themes identified in article 1 – comprising union and member obligations – was supported by the findings of the second paper as both of these factors had a Cronbach alpha (α) of 0.96, and are thus accurate predictors expectations and obligations governing the member-union relationship.

The findings of the second article indicate that the current emotions involved in the member-union psychological contract as well as the state of the psychological contract are relatively positive, indicating that employees in the educational sector of South Africa feel relatively content with the state of their relationship with their respective unions. This point to perceptions held by educators that their respective unions have relatively succeeded in maintaining the psychological contract – by successfully performing their responsibilities within this relationship – and perceived feelings of violation is thus low. The current state of the member-union relationship is a little lower than the emotions concerning the relationship, indicating room for improvement with regards to the expectations fulfilled by unions.

The second article set out to measure the Member-Union Psychological Contract, by building on and utilising the findings of the first. The objectives of this article was fulfilled by compiling a questionnaire, and by statistically analysing the empirical data obtained. The results indicate that the questionnaire is in fact an accurate predictor of the current emotional and psychological state of the member-union relationship.

LIMITATIONS

The only identifiable limitation to this study is the lack in generalisability of the findings of this study to sectors other than the education sector in South Africa. As all possible sources of information was saturated, and compared with the views and feelings of union officials, this study's findings represent a holistic overview of the expectations and obligations that govern the member-union relationship within the education sector of South Africa, and it may be generalised to the wider educational population. Freese and Schalk (2008) have suggested that in order to accurately measure the psychological contract between any two parties, the themes which will be included in the measure should be determined qualitatively, and a measure constructed accordingly, as was done in this study.

SUGGESTIONS FOR FUTURE RESEARCH

As mentioned earlier, more and more research in psychological contract theory explore the application of this diverse theory to relationships other than the traditional employee-employer relationship. Previous research done by De Witte *et al.* (2008) and Turnley, Bolino, Lester, and Bloodgood (2004) have suggested, the psychological contract within the employee-employer relationship, may affect the member-union psychological contract, and vice versa. This is suggested as perceived unmet expectations within the member-union psychological contract, may result from perceptions of breach and violation within the employee-employer relationship, and will result in negative consequences for the member-union relationship. It is thus worthwhile to determine both the member-union and employee-employer relationship within the same company/organisation by jointly administering these two psychological contract measures and comparing the results of the two questionnaires. This may assist in identifying certain phenomena within the organisation which may be influenced by the union, as well as phenomena within the union which may be influenced by the organisation. Further research into member-union relationships – coupled with employee-employer psychological contract measures – may also aid in a better understanding of the employees' propensity to unionise. This may also aid in a better understanding the mechanics of the member-union relationship, as well as its role in the organisation.

It is suggested that future research aim to reproduce this study's findings, to compare it with the findings of this study to ensure the generalisability, reliability and applicability of the findings. It is also suggested that future study compare the themes identified in article one with their findings, in order to maybe determine themes universal to all employees in all sectors of industry.

CONCLUSION

This study compiled and tested the first known Member-Union Psychological Contract measure. This research opens vast doors in the assessment of the member-union exchange relationship, and contributes to a better understanding of the workings and underlying expectations and obligations that govern this relationship. In order for unions to better understand their perceived, attributed obligations towards their members as well as the needs of their members, similar research approaches can be applied in order to assess whether the union fulfils its duties as well as to what extent these duties are fulfilled, and may enlighten possible areas for improvement as well as recent needs that may arise due to changing circumstances. The member-union relationship influences, and is in turn influenced by the employee-employer relationship as these two exchange relationships interact on a daily basis. Consequently, the need for further research into these two relationships as well as the influential mechanics underlying these two intertwined relationships is of utmost importance in the establishment and maintenance of individual and organisational wellbeing, and this study took the first steps in this pioneering exploration.

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ADDENDUM 1 – SOUTH AFRICAN JOURNAL OF LABOUR RELATIONS



South African



**Journal of
Labour Relations**

Graduate School of Business Leadership
University of South Africa
PO Box 392
PRETORIA
0003

21 October 2008

Dear Mr H Henderson

Re: Expectations and obligations governing the member-union relationship – A psychological contract perspective

Thank you for submitting your manuscript for possible publication in the Southern African Journal of Labour Relations.

Your manuscript has been forwarded for refereeing and we will let you know in due course whether it has been found acceptable for publication in the SAJLR.

Yours sincerely

Prof Lize Booysen
Editor: *South African Journal of Labour Relations*

Editor: Prof AE Booysen, University of South Africa
Editorial committee: Prof M Anstey, Nelson Mandela Metropolitan University; Prof AE Booysen, University of South Africa; Prof BJ Erasmus, University of South Africa; Prof FM Horwitz, University of Cape Town

Louise

ADDENDUM 2 – EDITORIAL POLICY AND GUIDELINES FOR CONTRIBUTORS

EDITORIAL MISSION

It is the purpose of the journal to promote and facilitate the understanding and development of theories and practices concerned with people in relation to employment in its broadest sense, by providing a forum for constructive debate, discussion, analysis, report and commentary.

SCOPE OF THE JOURNAL

Apart from articles of an academic nature which are research based, the journal will publish commentaries, analyses, overviews, case studies, survey results and reports on aspects related to employment relations (in the broadest sense) in South and southern Africa in particular — as well as any relevant international issues in terms of current ideas, theory-building and developments in practice. While interested authors from any country are invited to submit their work for possible publication, Africa-related themes are especially encouraged in the context of the dire need to develop indigenous theory and understanding of people management in the African context.

“Employment relations” is a term which is broadly defined as including aspects related to: work, employment and unemployment; labour and trade unionism; organisational behaviour, change and development; education, training and management development; labour law; collective bargaining, direct and indirect forms of worker participation and industrial democracy at all levels from the shop floor to the national level of tripartism; labour economics and labour market developments; forms of industrial conflict; organisational and crosscultural communication; national labour policy trends and developments; human resource management topics, including, but not limited to, equal opportunities, affirmative action, discrimination, diversified and multi-cultural workforces, human resource planning, job and work design, recruitment and selection, organisation entry, performance management, career and succession management, health, safety and employee well-being, motivation, leadership, remuneration and reward management; broader environmental trends as they relate to employment; and international comparative employment relations and themes related to people management strategies and practices in general.

The journal will therefore be of interest to practitioners, researchers, academics, trainers and educators as well as policy-makers in the private, public and semi-public sectors of South Africa and other countries.

SUBMISSION

The journal welcomes the submission of manuscripts by policymakers, practitioners, academics and researchers. Contributions for the *Academic* section (accredited) are especially welcome. The criteria for acceptance are based on the soundness of the research base and/or the academic rigour of the arguments provided. Also welcome for the *Forum* section (non-accredited) are comments and/or reports on interesting and relevant developments and/or case studies with significant practical value but without the necessary theoretical or academic underpinning.

As far as possible, manuscripts should display a fine balance between wellattested facts and well-informed opinion and argument and a writing style which is intelligible to specialists and non-specialists.

Manuscripts should preferably be submitted in English, in double-spaced typescript with wide margins. Articles for the *Academic* section should be between 5 000 and 10 000 words, and those for the *Forum* section between 2 000 and 5 000 words. All submissions should have a title of preferably no more than fifteen words and should be accompanied by a brief autobiographical note which includes the name(s) of the author(s), the position held and the name of the employer as well as an abstract of 100-150 words.

The abstract and the note should be typed on separate pages.

As far as possible, manuscripts should be produced on a computer with an IBM PC-compatible package (preferably WP8). **Three copies** of the manuscript should be submitted together with the **disk**. The word-processing package and the name of the document should be clearly indicated on the disk and the manuscript. The disk may be returned to the author on request.

Clearly numbered graphs and figures should be typed or drawn on separate sheets, preferably in the form of camera-ready copies. The place in the text where figures, graphs or tables should be inserted must be clearly marked.

The Harvard system of referencing should be used. Footnotes should be avoided; if notes are necessary these should be endnotes. Italics (underlining) should be avoided and should be reserved for emphasis. (Prospective contributors may use recent copies of the journal as guidelines.)

The Editor reserves the right to accept other styles, to make minor alterations to the style of to reject any manuscript because of style, content or other deficiencies.

ADDENDUM 3 – EXPECTATIONS AND OBLIGATIONS OF THE MEMBER- UNION RELATIONSHIP QUESTIONNAIRE

Please tick all boxes where applicable, and fill in the blank spaces. Please be as honest as possible.

Biographical information:

Gender	☐ Male	☐ Female			
Age	☐ 20-29	☐ 30-39	☐ 40-49	☐ 50-59	☐ 60+
Race	☐ African	☐ Coloured	☐ Indian	☐ White	
Marital status	☐ Single	☐ Married	☐ Divorced	☐ Widow/Widower	
Union membership	☐ NAPTOSA	☐ NATU	☐ SADTU	☐ SAOU	☐ Other

Research questions:

Please list up to 10 expectations you have of your union \ Lys asseblief tot 10 verwagtinge wat jy het van jou vakbond:

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

Please list up to 10 obligations you have towards your union \ Lys asseblief tot 10 verpligtinge wat jy het teenoor jou vakbond:

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

*Please encircle the most important answer given, according to you, in each question.
Thank you for your time!*



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