

Collective Voice and Worker Well-being: Union Influence on Performance Monitoring and Emotional Exhaustion in Call Centers

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This study analyses the impact of union actions on worker well-being. It examines union efforts to reduce emotional exhaustion associated with performance monitoring in call center jobs, drawing on quantitative ($N = 1894$) and qualitative (interviews and focus groups) data in the United States. Findings suggest that the effective exercise of collective voice, through collective bargaining and activism by union officials, can reduce emotional exhaustion by promoting fair and developmental monitoring practices.

Introduction

Workplace stress is a growing problem, with serious consequences for employee health and well-being. By some estimates, 83% of US workers suffer from work-related stress, contributing to 120,000 deaths and \$190 billion in healthcare costs annually (American Institute of Stress 2019). Labor unions are on the front lines of efforts to combat well-established causes of stress at work. They negotiate agreements protecting workers from intensive monitoring, unpredictable pay and work schedules, and arbitrary use of discipline. Union shop stewards enforce collective agreement provisions, engage in labor-management cooperation over key areas of mutual concern, and initiate campaigns designed to alleviate stress in the workplace. However, there is limited evidence concerning the effectiveness of these efforts and the conditions under which they succeed or fail.

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In this article, we analyze unions' impact on employee well-being in front-line call center jobs, with a focus on union efforts to improve the developmental focus and fairness of performance monitoring practices. Our central concern is with the scope and effectiveness of these efforts, as well as the mechanisms through which they influence workers' experience of emotional exhaustion. When connected to the workplace, emotional exhaustion results from stressful working conditions and is a critical component of burnout (Halbesleben and Bowler 2007), as well as a negative indicator of employee well-being (De Jonge and Schaufeli 1998). Emotional exhaustion has been found to be particularly high in front-line service settings, due to additional psychological demands associated with emotional labor in customer interactions (Chen and Chang 2019; Kim, Paek, and Choi 2012). Thus, it is a useful variable for capturing differences in the quality and impact of union interventions in these workplaces.

We draw on several streams of theory and research to develop our hypotheses. First, the organizational behavior (OB) literature on "job demands and resources" suggests that performance monitoring will increase emotional exhaustion where it places excessive demands on employees, while resources that either reduce or help employees to manage these demands will decrease exhaustion (Kuhl 1992; Wright and Cropanzano 1998). Second, a related literature on employee voice and well-being views voice mechanisms as a resource for mitigating the negative impact of job demands, as well as for improving perceptions of organizational justice. Within the industrial relations (IR) literature, voice is conceived more often as a collective (rather than individual) resource (Budd et al. 2010; Freeman and Medoff 1984; Kaufman 2015), exercised most effectively through negotiated rules and their application or enforcement. Drawing on these two literatures, we argue that a central component of union influence on employee well-being is union representatives' capacity to improve both the developmental content and the fairness of HRM policies and practices – or encourage "procedural justice" – via the exercise of countervailing labor power in the firm and workplace.

Our study examines these relationships through a mixed-method analysis of 1894 survey responses from call center workers across six employers, comprising sixteen union bargaining units, and interviews and focus groups with worker representatives across these employers and units. Through examining one group of workers with similar tasks, based in one industry, we are able to reduce variation in structural and institutional conditions that complicate the interpretation of findings in multi-industry studies. By incorporating interviews and surveys across bargaining units and employers represented by one national union, we can more directly investigate local variation in "what unions do" and what limitations they face within similar front-line service workplaces.

Literature Review

Our broad concern is with understanding the relationship between union representation and employee well-being, via union influence over performance monitoring. Well-being has been defined in several ways, based on a range of subjective and objective measures (Budd and Spencer 2015). We use the term here in the broad sense as capturing employees' overall psychological health or quality of life and thus as potentially measured through a range of different constructs (Wood 2008). The measure of (negative) well-being we use in this study is emotional exhaustion, which, according to Maslach (1993), is a critical component of employee burnout and takes place when employees' emotional resources have been depleted. It represents the culmination of repeated exposure to stress. This emotional state triggers mechanisms that can affect other psychological dimensions of well-being, including depersonalisation of clients or customers and a reduced sense of personal accomplishment (Cordes and Dougherty 1993). Emotional exhaustion has been negatively associated with other commonly studied attitudinal measures of well-being, such as job satisfaction (Kanten and Yesiltas 2015; Neto, Ferreira, and Martinez 2017; Wang and Li 2015).

Performance management entails an "integrated process" whereby managers set standards, measure employee outcomes, and reward performance to further the success of the organization (Den Hartog and Boselie 2004). A central component of performance management is performance monitoring, whereby data on employee performance are collected – through electronic systems or direct observation by supervisors – and used for training, rewards, or sanctions and discipline (Ravid, Tomczak, and White 2020).

Past OB research has found that employee voice, defined broadly as participation in decision-making, can reduce exhaustion and burnout (Bakker, Demerouti, and De Boer 2003; Conway et al. 2016). The job demands-resources model suggests that certain job resources, or characteristics that contribute toward achieving goals at work (e.g., performance goals or metrics), can reduce psychological costs associated with job demands (Bakker and Demerouti 2007). Thus, voice can serve as a resource for employees both to manage demands and to improve their sense of control over these demands (Karasek 1979; Wood 2008). Given the importance of monitoring methods and metrics to work pace, rewards, and continued employment, we would expect greater perceived involvement and control over performance monitoring to be a particularly valued resource by employees.

There is some evidence to support this expectation. Conway et al. (2016) found that performance management's negative effects on emotional exhaustion in an Irish public sector organization were weaker when employees had

access to voice mechanisms. However, in line with the broader OB literature, voice was operationalized as individual access to information and participation. This tends to be a relatively weak measure of actual influence and control and may explain some of the mixed findings in this literature – with several studies finding that (individual) employee voice had no effect on stress or other measures of well-being (e.g., Boxall and Macky 2014; Topcic and Baum 2016).

IR theory and research suggest that collective or representative forms of employee voice, through unions with formal bargaining rights, can have a more direct impact on HRM policies, including performance monitoring. In this way, unions serve as a vehicle for voice, providing concrete forms of influence over how pay, benefits, and work arrangements are designed (Bamber, Gittel, and Kochan 2013; Kochan and Osterman 1994). They can also play a critical role in improving the effectiveness of other voice mechanisms in the workplace (Gill 2009; Pohler and Luchak 2014). For example, Godard (2010) found that participative practices were associated with measures of well-being (greater satisfaction, reduced stress) among union represented employees, but not among those without union representation. In this way, unions may be viewed both as a source of social support, helping employees cope with high demands where they otherwise lack control (Wood 2008: 157), and as a resource for enhancing control itself via more effective forms of individual voice.

Our analysis contributes to both of these literatures through providing original insights on the impact of collective employee voice on employee well-being, as well as through exploring the paths through which unions can contribute to improved well-being. We focus on performance monitoring because it is often an important topic of collective bargaining (Burke and Greenglass 2001) and a major source of worker stress (Castanheira and Chambel 2010; Holman and Chissick 2002; Topcic et al. 2016). To develop our hypothesized model, we first discuss the relationship between union representation and employee well-being and then the mediating role of performance monitoring, focusing both on its developmental content and perceived fairness.

Union instrumentality and employee well-being. The above discussion suggests unions should improve well-being through enhancing employee voice. However, findings are mixed, with some recent research showing a positive association between union membership or bargaining coverage and employee well-being (Blanchflower and Bryson 2020) and others reporting more mixed results (Laroche 2016). One reason for negative associations may be that most IR studies operationalize well-being based on self-reported job satisfaction – which has been theorized to be lower in unionized workplaces due to constraints on “exit” or “voice-induced complaining” (Freeman and Medoff 1984).

A few UK-based studies using the WERS survey include scales measuring “job-related anxiety-comfort”, which provide a more direct measure of union effects on psychological well-being. However, these findings are also mixed. While Wood (2008) found no association between union membership and anxiety-comfort, Bryson and Barth (2013) found that unions mitigated the negative effects of organizational change on this measure.

Another explanation for the mixed findings may be that most studies have used relatively blunt measures of union membership or bargaining coverage, which may not capture the actual effectiveness of unions in providing representation or supporting workers. The main focus of our analysis is on *union instrumentality*. Union instrumentality reflects worker perceptions of a union’s capacity to achieve desired outcomes, often in the form of economic concerns (e.g., wages and benefits), but also related to management policies and practices (Shore, Tetrick, and Sinclair 1994; Sinclair and Tetrick 1995). We expect union instrumentality to provide a more differentiated measure of union representation, capturing worker perceptions that their union representatives are effective as a vehicle of collective voice, through representing their interests and improving the working environment. This is a means of operationalizing voice as a form of collective power as opposed to simply a tool for expressing individual dissatisfaction or feedback on work processes to management (Dundon, Wilkinson, and Marchington 2004; Freeman and Medoff 1984).

There is limited evidence on the relationship between union instrumentality and well-being, as most studies of union instrumentality evaluate its association with measures of union participation or support rather than worker outcomes (Tetrick, Shore, and McClurg 2007). However, Burke and Greenglass (2001) found that workers who viewed their unions as more supportive in providing them with protections, such as from job insecurity and unfair management practices, were less likely to experience psychosomatic symptoms and had lower psychological burnout rates. In addition, past research has shown an association between supervisor support and well-being, which suggests that similar relationships may exist for supportive or helpful unions. For example, research by Deery and Iverson (2010) in call centers found that supervisor support helped to lessen the effects of job demands on emotional exhaustion. These findings can be situated within the broader literature on perceived organizational support, which has been found to increase perceptions of fairness and buffer employees from strain, contributing to improved well-being across different measures (Rhoades and Eisenberger 2002).

Taken together, the above suggests that across unionized workplaces, union instrumentality provides a good proxy for the strength of union collective voice effects, as well as whether employees view the union as an effective

resource within a demanding work setting. In line with job demands-resources theory, we expect that:

H1 Union instrumentality is negatively related to emotional exhaustion.

The mediating role of performance monitoring. Beyond the direct relationship between union instrumentality and well-being, we are also interested in understanding mechanisms or paths connecting the two. Put another way, what concrete changes can unions make in the workplace to reduce stress or burn-out? As described above, we focus on performance monitoring. Studies find that more intensive performance monitoring is associated with emotional exhaustion and other stress-related indicators (e.g., Davidson and Henderson 2000; Smith et al. 1992). However, these effects are often nonlinear (Brown and Benson 2003) and depend on the characteristics of the performance monitoring system (Carayon 1993; Van Waeyenberg and Peccei 2020).

Past research suggests that two aspects of performance monitoring are both important for worker well-being and likely to be a key focus of union representation and bargaining: the developmental use of monitoring information and the perceived fairness of monitoring practices and metrics.

First, employee well-being can be affected by *how monitoring information is used*, or the “purpose” of monitoring, including the extent to which performance data are used to develop employees. The job demands-resources model suggests that where employees are given support to improve their performance, via further training or developmental coaching, the systematic gathering of performance data may be seen more as a resource for managing other job demands. Through feedback and the provision of opportunities for development, employees are better equipped to deal with workload intensification and emotional demands (Tseng and Levy 2019). Shantz, Arevshatian, and Alfes (2016) and Van de Voorde and Beijer (2015) found that employees experienced less emotional exhaustion when they perceived that their organisation’s HRM practices were there to support their job performance, as opposed to reducing organisational costs. Past research has also shown that, if the consequences of poor performance ratings lead to discipline, stress levels will be higher than if a poor rating leads to development or training (Nebeker and Tatum 1993). In a call center setting, Holman et al. (2002) found that depression, anxiety, and emotional exhaustion were all lower when monitoring information was used to develop rather than to discipline employees.

Second, well-being may be affected by the *perceived fairness* of monitoring practices and performance metrics (Konovsky et al. 1987; Lind and Tyler 1998). Here we draw on theories of organizational justice – focusing in

particular on procedural justice, which assesses the quality and fairness of decision-making procedures, such as whether they include input from affected parties and are consistently applied, unbiased, accurate, and ethical (Greenberg 1990). Research has shown that individuals' justice perceptions are strongly connected to well-being. For example, Howard and Cordes (2010) found that perceived injustice in the workplace was associated with greater absenteeism, alienation, alcoholism, and turnover, while Maslach and Leiter (2008) showed that perceived injustice negatively affected employees' ability to cope with work demands.

Performance monitoring has been found to play a central role in perceptions of justice at the workplace (Stanton 2000) and hence to be potentially an important driver of stress or burnout. Monitoring that is perceived to be fair or procedurally "just" is likely to create less significant job demands relative to monitoring that employees perceive to be based on metrics that are unfair or unattainable. Studies in both higher education (Bauwens, Audenaert, and Huisman 2019) and the public sector (Brown and Benson 2003) have found lower rates of stress and burnout where performance management practices were perceived as fair.

Thus, past OB research has established a relationship between both developmental performance monitoring and perceived fairness of performance monitoring and measures of psychological well-being. This finding, of course, is in many ways intuitive for IR scholars as well as for labor unions. Employees are less stressed and generally better off where they are not afraid that a drop in performance will lead to being disciplined or losing their job. They also appreciate performance metrics that are designed and applied in a fair way – for example, without favoritism and with a clear appeals process. In service workplaces like call centers, where a range of metrics are gathered electronically through supervisor evaluations and customer surveys, fairness might be judged, for example, on whether metrics are attainable and accurately reflect effort, as well as whether adjustments can be made for factors employees have no control over.

Unions recognize this, and often seek to bargain over, and represent workers' interests in, more developmental and fair ways of assessing performance. The IR literature on union influence on variable pay, for example, has shown that collective bargaining over these schemes often focuses on procedural fairness (Marginson and Arrowsmith 2008). Past research in call centers has found that unions place a strong emphasis on challenging "discipline-based" performance management practices and encouraging more developmental ones focused on training and development, as well as in establishing more fair and transparent processes for evaluating and rewarding performance (Doellgast and Marsden 2019).

Building on this, we expect our two measures of performance monitoring – developmental monitoring and perceived fairness – to mediate the relationship between union instrumentality and emotional exhaustion.

Again, our focus on union instrumentality distinguishes this study from past research that has attempted to measure union effects on management practices and worker outcomes using more blunt measures of union membership or collective agreement presence. While collective agreements often include due process rules for disciplining workers, as well as commitments to invest in training and development, these can be difficult for unions to enforce (Doellgast 2008). This is particularly the case in “liberal market economies” like the US and UK, where research has typically found no or weak association between union representation and high involvement work practices associated with more developmental and fair performance monitoring (Osterman 1994: 109; Wood 1996) including in comparative research on call centers’ use of these practices (Doellgast et al. 2009). One explanation for these mixed results is that unions’ weak formal bargaining rights over the detail and design of performance monitoring contributes to variation in outcomes based on more informal, and locally distinct, differences in the effectiveness of union voice.

Our measure of union instrumentality, based on employee perceptions of union influence in improving the quality of management practices in their call center, captures more precisely these differences. On the one hand, union representatives can encourage more developmental use of the same formal monitoring tools, through local partnerships, involvement in supervisor training, and grieving disciplinary cases. On the other hand, they play a central oversight role in arguing against local practices members view as unfair. As Johnson and Jarley (2004: 546) write, “[union] leaders can set the stage for collective action against workplace injustice by enacting fair procedures and emphasizing interactional justice in conducting day-to-day member relations.” Put in the terms of the organizational justice theories cited above, the effectiveness, rather than simply the presence, of employee voice is a central factor contributing to procedural justice (Bies and Shapiro 1988; Eigen and Litwin 2014). Thus, we expect that where union instrumentality is higher, unions will have more success in encouraging managers to develop rather than punish employees based on monitoring data, and the metrics themselves will more likely be measured and applied in a fair and transparent way.

We were able to find a few studies that have sought to test similar relationships using different (but related) measures to those we use here. Burke and Greenglass (2001) show that union support in shaping developmental management practices

towards workers affects correlates of emotional exhaustion such as anxiety and job satisfaction. Unlike research on union status, they unpack how union actions vary across workplaces rather than treating unionized workplaces as homogeneous. Another study by Aryee and Chay (2001) of a Singapore public sector union found that union instrumentality partially mediated the relationship between procedural justice and turnover intentions: suggesting at least an association between perceptions of union effectiveness, perceived fairness, and employee outcomes.

Based on past theory and research, we thus expect:

H2 The relationship between union instrumentality and emotional exhaustion is mediated by the extent to which performance monitoring is used for developmental purposes.

H3 The relationship between union instrumentality and emotional exhaustion is mediated by the perceived fairness of performance metrics.

The above discussion suggests that there is a close relationship between developmental monitoring and perceived fairness, both of which are interconnected with the goals of collective bargaining and union representation. Past OB research also finds the two measures are often closely related, as developmental monitoring can contribute towards a positive view of performance metrics as fair, transparent, and attainable. Karim (2015) found that participants in a training study viewed feedback as fairer when they were instructed that their performance would be tracked for developmental reasons. Barnes (2004) found that the aggressive use of performance monitoring for disciplinary purposes led to perceptions that metrics were unfair and were associated with forms of worker resistance. Likewise, these were viewed as fair where monitoring was used for developmental purposes, an objective often sought by unions.

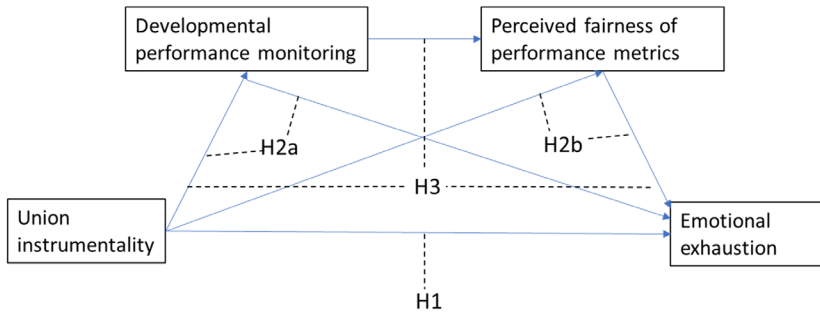
Thus, our final hypothesis ties in the relationship between developmental monitoring and the perceived fairness of performance metrics with the other paths identified above:

H4 The relationship between union instrumentality and emotional exhaustion is sequentially mediated by developmental performance monitoring and perceived fairness of performance metrics.

The preceding hypotheses are summarized in Figure 1 below.

FIGURE 1

HYPOTHESIZED RELATIONSHIPS BETWEEN UNION INSTRUMENTALITY, PERFORMANCE MONITORING, AND EMOTIONAL EXHAUSTION



Context and Design

We undertook our research at union-represented call centers in the U.S. We applied a sequential multi-level mixed-methods approach (Collins and Onwuegbuzie 2007) to examine the effects of union instrumentality on performance monitoring practices, the perceived fairness of metrics, and emotional exhaustion. Our methodology has qualitative and quantitative components. For the qualitative component, we conducted semi-structured interviews (2017) and focus groups (2019) with union representatives. For the quantitative component, we conducted a survey of call center workers (2017). Our analysis draws on findings from these different sources, including descriptive findings and a multi-step structural equation model (Hayes and Preacher 2011) conducted in STATA using bootstrapping procedures. The bootstrapping procedure uses resampling to construct more accurate confidence intervals to reduce bias in calculating indirect effects (Preacher and Hayes 2008).

First, in 2017, we conducted seven preliminary interviews with union leaders (e.g., President, Steward, Staff Representative) who negotiated contracts with or represented workers in call centers. We asked open-ended questions relating to the major topics we planned to include in the survey, including perceptions of the causes of worker stress; as well as their experience representing workers in key areas, including performance monitoring. Interviews were recorded, transcribed, and then summarized in a report, with quotes from interviewees organized by topic.

Second, we designed a preliminary draft of the survey, drawing in part on these interviews. The survey questions were distributed to interviewees, who provided feedback, and the revised survey was tested on a sample of

approximately three thousand members across eight employers, resulting in a 10% response rate (288 completed surveys). Union representatives then discussed the survey with their members, and based on their feedback we further revised the survey. The final survey was distributed to unionized US call center workers in 2017 (further details are provided below).

Third, we carried out a preliminary analysis of the survey findings and wrote a descriptive report for the union based on those findings. This report was distributed to union representatives for comment, and we carried out six focus groups in different union locals, with each having 10–20 participants, to discuss the findings and how they could be used in their work. In these focus groups, we presented our findings in different areas, pausing to ask participants questions about their experience with the different topics discussed in relation to their employers: whether the findings were consistent with their experiences, and how they would explain findings specific to their employer or bargaining unit based on these experiences. Union representatives from different bargaining units were able to compare local bargaining dynamics and their effects on the variables of interest, which aided in interpreting the survey results.

For the empirical analysis, we commence with our quantitative findings and then proceed with the qualitative findings. In the former component, we provide a more detailed overview of the methods and measures used for the final survey. This allows us to test the key relationships hypothesized above and to then draw on the qualitative findings to further validate those findings while providing conceptual clarity on how the variables interacted in the unionized call center context.

Quantitative Findings

Survey and measures. The survey was administered online to union-represented workers in call centers. In addition to emailing members on the union's database, we relied on local union representatives to send a link to the Qualtrics survey to their members by email. Union officials who participated sent our survey to the entire list of members working in call centers in their locals. The recruitment email explained that data collection and analysis were conducted by university researchers independently from the union.

We initially received 2199 usable surveys and were able to match 2100 to union-represented employers and collective agreements. We subsequently narrowed our sample to employees of major telecommunications employers, to reduce potential industry- and work task-based variation, resulting in 1894 surveys across six employers and sixteen bargaining units. This represents a response rate of 5.4% out of the full population of 34,959 call center workers

across these units. Response rates to emailed and online surveys tend to be lower than those administered in person (Baruch and Holtom 2008). 1576 of the surveys contained missing information (range: 24–38% per variable). Full information maximum likelihood (FIML) estimates were applied to account for missing data in the structural equation model (SEM). This data analysis technique is associated with greater efficiency and less bias than other methods (e.g., imputation, listwise and pairwise deletion) (Enders and Bandalos 2001).

Given our low response rate, we did several things to improve our confidence in the representativeness of our sample and the generalizability of our findings. First, we asked union officials in the central union and across different departments to validate that the demographic characteristics of our sample are consistent with those with their membership. Second, we compared demographic characteristics across two occupations in our sample (customer service representatives and telemarketers) to Bureau of Labor Statistics (BLS) data.¹ The breakdown by gender and race were broadly similar, with somewhat higher proportions of Latinx employees in the BLS sample. The most significant difference is that the median age for these two groups in our sample was 6–10 years higher. This is not surprising, as employee retention is typically higher in unionized call centers due to superior job security, higher pay, and opportunities for upward mobility (Batt et al. 2009; Doellgast 2008).

Finally, our use of mixed methods enables us to validate our quantitative findings through in-depth investigation of qualitative data. In the focus groups, we asked union representatives to discuss whether the quantitative findings were consistent with their experience on the ground. We cannot rule out bias based on other characteristics of the respondents who chose to answer the survey. However, triangulation across these different data sources improves our confidence that our sample is representative and our findings are meaningful.

We assessed model fit with the Chi-square (χ^2), root mean square error of approximation (RMSEA), the Tucker-Lewis Index (TLI), and the Comparative

¹ We drew on occupational data from the BLS to assess the representativeness of our sample. We compared the BLS data on “customer service representatives” and “telemarketers” with those in our dataset. The BLS classification for customer service representative is frequently used to describe call center professionals in the US, but its dataset includes a minority of employees who operate in retail contexts. The telemarketers Classification refers exclusively to employees in call center environments. In the BLS data (our sample), 65.1 (66.5)% of customer representatives were women, 73.2 (68)% were Caucasian, 17.2 (20.2)% were African American, and 17.4 (12.7) % were Latinx. In the telemarketing samples, 69.4 (70.8)% of telemarketers were women, 61.3 (64.1)% were Caucasian, 24.7 (22.2)% were African American, and 25.8(15)% were Latinx. The median age of customer representatives was 35.8, and of telemarketers was 31.5 in the BLS sample (in our sample, equivalent median ages were 42 and 41, respectively). Across our full sample, 93% engaged in customer service, 64% engaged in inbound sales, and only 6% engaged in outbound sales or telemarketing. 99% of the workers were full-time and 66% were female. 68% of respondents were Caucasian, 20% were black, and 13% were Latinx. The average age was 43 (SD = 11).

Fit Index (CFI), conforming to the standard set by Hu and Bentler (1999) and McDonald and Ho (2002). We applied bootstrapping with a thousand replicated samples and confidence intervals corrected for at a bias level of 95%.

We performed Harman's single-factor test which is one procedure recommended to account for possible common-method variance (Podsakoff, MacKenzie, and Lee 2003; Tehseen and Ramayah 2017). This was done using principal component analysis (PCA) on all the variables in the model (fourteen in total, including average scores for union instrumentality and emotional exhaustion) and the varimax rotation method. The PCA identified seven factors with eigenvalues greater than one, and these accounted for 67% of the total variance. The first factor with the greatest eigenvalue only explained 14% of the variance. These results suggest that common method variance is likely not an issue in our analysis.

Our central outcome measure is *emotional exhaustion*. We use a six-item scale (Cronbach's alpha .94) used by Wharton (1993) to measure "job-related emotional exhaustion" (p. 213) and applied by van Jaarsveld and Walker (2010) in a survey of call center workers. Questions were adapted from the Maslach Burnout Inventory (MBI)'s subscale measuring emotional exhaustion (Maslach and Jackson 1981) and use a six-point Likert scale ranging from "never" to "daily" in response to questions such as: "Please indicate how often you have felt this way while at work: - I feel burned out from my work".

Second, we measure *union instrumentality* using a four-item scale (Cronbach's alpha .86) that seeks to measure the influence of union activities on specific areas of concern to members within an organization (Aryee and Chay 2001; Chacko 1985; Sinclair and Tetrick 1995). Employees report on the perceived helpfulness of the union in improving conditions in their call center in four areas: fairness of performance monitoring and evaluation, training quantity and quality, protecting employees from discipline or unfair dismissal, and scheduling predictability. Employees rated the union's helpfulness on a scale of 1 (extremely unhelpful) to 5 (extremely helpful).

Two variables measure employees' experiences with performance monitoring. *Perceived fairness of performance metrics* was measured using a five-point Likert scale. Employees were asked to rate the extent to which they agreed with the question: "At my call center: - Metrics are reasonable". Responses ranged from 1 (strongly disagree) to 5 (strongly agree). The *use of employee monitoring for developmental purposes* was measured using a five-point Likert scale. Employees were asked to rate how strongly they agreed or disagreed with the following statement: "The information from electronic performance monitoring is used to help develop your skills and abilities". Responses ranged from 1 (strongly disagree) to 5 (strongly agree).

Ten control variables were also included in the model. We controlled for *education level* as past research suggests that its interactions with employee skills and job demands affect stress levels, in ways which may be contradictory (Ogbonnaya and Messersmith 2019). We controlled for *gender* in its binary form (0 = male, 1 = female), as prior research suggests that women experience stress (Kim and Murrmann 2009) and related work outcomes (Hauret and Williams 2017) differently than men. We also controlled for *age*, whether respondents have any *children* at home under 5, and *call length* as a proxy for variation in call complexity. Finally, we controlled for *employer* to account for firm-level differences in the overall HR strategy or labor relations approach.

SEM model results. We begin by presenting descriptive data on the variables, and then discuss the findings from the structural equation model (SEM).

Table 1 contains the means, standard deviations, and correlations of the variables in this study, as well as the Cronbach Alphas (in the legend). The structural equation model was specified using seven observed variables (i.e., developmental performance monitoring, perceived fairness of performance monitoring, and the five control variables) and two latent variables. Consistent with the SEM approach (Williams and Vandenberg 2009), we regressed the control variables with the dependent variable (emotional exhaustion) and mediating variables (developmental performance monitoring and perceived fairness of performance monitoring) and let them covary.

A confirmatory factor analysis (CFA) supported the underlying dimensions for the two latent variables – union instrumentality (four items) and emotional exhaustion (six items) – across most goodness of fit indices ($\chi^2(34) = 565.402$, $p < .000$; RMSEA = .103, TLI = .929, CFI = .947). When all items are loaded onto one factor, fit is considerably worse ($\chi^2(35) = 2652.908$, $p < .000$; RMSEA = .225, TLI = .662, CFI = .737).

The model was estimated using full information maximum likelihood estimation with bootstrapping. We compared the fit of the current model containing all paths to alternative mediation models in Table 2. The fit of this model was acceptable and greater than the alternative models that were specified. Fit was marginally weaker when the path between union instrumentality and the perceived fairness of performance metrics was excluded. Fit was weaker still when the path between developmental monitoring and emotional exhaustion was dropped.

Figure 2 shows the standardized parameter estimates of the relations among variables in the model. Our results are as follows. First, our analysis shows support for the direct path showing that union instrumentality was negatively associated with emotional exhaustion (H1) ($b = -.12$, $p < .001$). Second, support was also found for the paths showing that union instrumentality

TABLE 1
MEANS, STANDARD DEVIATIONS, AND CORRELATIONS

	1	2	3	4	5	6	7	8	9	10	11	12	13	14
1 Emotional exhaustion														
2 Union instrumentality	-0.17**													
3 Developmental monitoring	-0.33**	0.17**												
4 Fairness	-0.41**	0.15**	0.36**											
5 Call length	0.06	0.01	0.02	-0.12**										
6 Education	-0.04	-0.01	-0.01	0.00	0.02									
7 Gender	0.07	0.06	-0.06*	-0.05	-0.00	-0.10**								
8 Age	0.03	-0.11**	-0.14**	-0.12**	-0.09**	0.19**	0.11**							
9 Children (y/n)	-0.02	0.04	0.02	0.07**	0.02	-0.01	-0.06*	-0.31**						
10 Employer 1	-0.01	-0.04	-0.06*	-0.05	-0.07**	0.02	0.02	0.12**	-0.02					
11 Employer 2	-0.02	0.00	0.09**	0.04	0.11**	-0.06*	0.05	-0.19**	0.05	-0.50**				
12 Employer 3	-0.07**	-0.02	0.04	0.08**	-0.14**	0.00	-0.11**	-0.01	-0.02	-0.16**	-0.21**			
13 Employer 4	0.00	0.05	0.05*	0.02	0.09**	-0.04	0.02	-0.09**	0.02	-0.11**	-0.15**	-0.05*		
14 Employer 5	0.00	0.05	0.00	0.00	-0.05*	-0.01	0.03	0.08**	-0.03	-0.14**	-0.19**	-0.06**	-0.04	
M	4.95	3.41	1.96	2.51	4.70	4.62	0.65	42.94	0.21	0.27	0.40	0.06	0.03	0.05
SD	0.04	0.03	0.03	0.04	0.04	0.46	0.01	0.34	0.01	0.44	0.49	0.25	0.18	0.22

M = mean, SD = standard deviation, n = 1894.

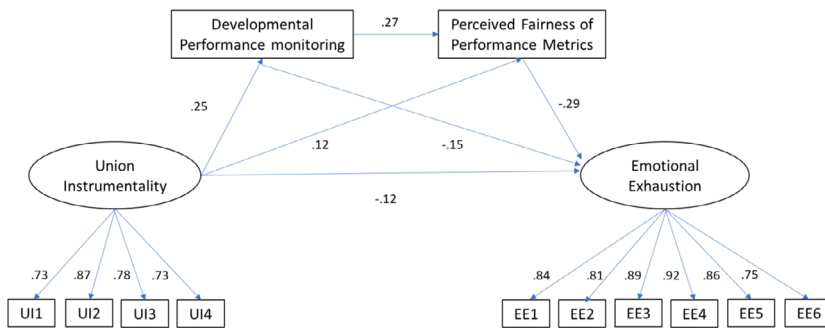
Cronbach Alphas: emotional exhaustion = .94, union instrumentality = .86.

*p < .05.; **p < .01.

TABLE 2
SUMMARY OF FIT FOR ALTERNATIVE MEDIATION MODELS

	χ^2	<i>df</i>	<i>p</i> -value	CFI	TLI	RMSEA
1 All paths (current model)	737.248	140	.00	.944	.926	.047
2 Path from union instrumentality to perceived fairness of performance monitoring removed	751.256	142	.00	.943	.925	.048
3 Path from developmental monitoring to perceived fairness of performance monitoring removed	793.102	142	.00	.939	.920	.049

FIGURE 2
STRUCTURAL EQUATION MODEL OF UNION INSTRUMENTALITY, PERFORMANCE MONITORING, AND EMOTIONAL EXHAUSTION.



Note: SEM outputs include path coefficients and factor loadings. All coefficients presented above were statistically significant ($p < .001$). The control variables were call length, education, gender, age, children, and employers 1–5

negatively affected emotional exhaustion indirectly through its associations with the perceived use of performance monitoring for developmental purposes and the perceived fairness of performance management metrics. All three paths were triggered. First, union instrumentality was positively associated with the use of developmental monitoring ($b = .25, p < .001$), which was negatively associated with emotional exhaustion ($b = -.15, p < .001$) (H2). Second, union instrumentality was positively associated with the perceived fairness of performance metrics ($b = .12, p < .001$), which was negatively associated with emotional exhaustion ($b = -.29, p < .001$) (H3).

Third, there was support for our proposed sequential mediation pathway which suggests that the union reduced emotional exhaustion through its positive association with developmental monitoring and hence the perceived

TABLE 3
RESULTS FOR STRUCTURAL PATHS

Structural paths		Direct effects	Indirect effects	Total effects
Union instrumentality	Emotional exhaustion	-0.119* (-3.90)	-.092* (-6.06)	-0.212* (-6.01)
	Developmental performance monitoring	0.255* (5.53)	-	0.255* (5.53)
	Perceived fairness of performance metrics	0.119* (3.45)	0.069* (5.06)	0.189* (5.19)
Developmental performance monitoring	Perceived fairness of performance metrics	0.271* (11.98)	-	0.271* (11.98)
	Emotional exhaustion	-0.147* (-6.67)	-0.078* (-7.57)	-0.226 (-9.75)
Perceived fairness of performance metrics	Emotional exhaustion	-0.289* (-6.67)	-	-0.289* (-9.90)

* $p < .01$, t -values are in parentheses.

fairness of performance management practices and metrics (H4). In particular, the indirect effects associated with union instrumentality towards emotional exhaustion were statistically significant ($b = -.09$, $p < .001$). Relatedly, the results suggest that developmental performance monitoring reduced emotional exhaustion via indirect effects on the perceived fairness of performance metrics ($b = -.08$, $p < .001$). The results for the structural paths are reported in Table 3.

Qualitative Findings

As described above, we carried out interviews and focus groups with union shop stewards and officials responsible for representing the call center workers we surveyed. Many of these interviewees were working in the call centers or had worked there in the past and thus had an intimate knowledge of both the problems workers faced and the role of the union in trying to address these problems. Below, we summarize these qualitative findings, dividing them into two areas central to our hypotheses and quantitative analysis: first, the importance of developmental monitoring and fairness to worker well-being and, second, the role of union agreements and actions in encouraging more developmental and fair monitoring practices. These findings go beyond a simple mapping of statistical relationships to illustrate more concretely the central role that collective voice can play in encouraging practices “on the ground” that have been found to improve worker well-being in a range of settings.

Developmental use of performance monitoring, fairness, and well-being. The analysis of survey results found significant relationships between the use of developmental performance monitoring, perceived fairness of performance metrics, and well-being. The qualitative findings provide a deeper illustration of how these variables interrelate. In interviews and focus groups, union representatives discussed the role of performance monitoring in driving up worker stress. As one worker complained, they “sit and just listen to call after call after call [. . .] It is stressful for the people sitting there knowing that you could possibly be the person whose calls are being listened to all day” [Focus group, B2/C2].

They can plug directly into the phone at your desk, which we prefer, because we can notice that they are listening. However, lately they have been doing it remotely, which adds additional stress. They will go in and start queuing you which is an instant message that will pop out in your screen, this distracts employees from the call. [Focus group, B2/C2]

A number of representatives indicated that monitoring was principally used for disciplinary purposes. However, there were key variations across workplaces. One representative with A1 argued that some managers relied on coercion to enforce performance standards, while the “most successful” ones were supportive. However, supportive management styles were perceived as exceptions rather than the norm. An interviewee with D1 discussed how managers were “targeting us. And basically [. . .] telling us that we’re not doing great on every call – so just excessive monitoring.” Describing the experience at B2 and C2, another representative claimed that “corrective action is much less about improving the calls than about getting employees to a higher discipline level.”

The major source of this fear was attached to not meeting an (often changing) set of performance metrics. Metrics and quotas were seen as either too high and often unobtainable, or unfair for other reasons. Not hitting quotas or goals often affected employees’ pay and evaluations and in many companies was associated with progressive discipline.

Union representatives provided two types of examples of how metrics used for performance evaluation could be perceived as unfair. The first concerned requiring employees to follow a certain set of seemingly arbitrary or unreasonable rules. This is particularly true of script adherence. For example, an official speaking on B2 and C2’s experience described how “you also must have a certain amount of clicks on your computer. Even if you know something like the back of your hand, you still have to pull up that information on your screen. [. . .] they can catch you for not following procedures on your screen.” This

same official described how agents were forced to use the phrase “always happy to help you out with that,” even though rigid script adherence led to more negative customer interactions. Consistent with these stories, a union representative with B4 described a code of misconduct that was given to an employee for “saying ‘service’ instead of ‘services’”.

A second example of unfair metrics concerned measures of service quality or call resolution that did not take into account contextual factors over which the reps had little control. One example was the lack of distinction between customer satisfaction with the service provided by the representative and the customer’s satisfaction with the company as a whole. A representative explained:

Let’s say I speak to you and you’re very mad at [Company D] but you’re so happy with the way that I treated you and you get a survey from the company and you’re rating the call a ‘1’ – which is bad – but you’re rating me not necessarily a ‘1’, you’re rating the company a ‘1’ because you’re mad at the company policy. That gives the company the opportunity to listen to every [call] that comes in, they listen to every single one. . . . [T]hey listen to the call and they pick apart that call and find ways to discipline you. Can you imagine? [Interview, D1]

A common metric used to evaluate customer service representatives was the number (or percentage) of customers who called back within a certain number of days. At Company D, even if the customer called about an unrelated inquiry, their repeat call still counted against the last representative who interacted with them.

We have [a repeat call metric] – first call resolution [. . .] If a customer calls in within 30 days, right, it goes against my appraisals. So at the end – during mid-year appraisals when I’m going to be appraised, even if it’s an [. . .] unrelated inquiry, it still goes against me. [Interview, D1]

Another metric over which some union officials felt their members had limited control was the number of calls that they had to transfer to other departments. One interviewee described the dilemma faced by representatives in this way:

They have metrics where if you transfer a call that you can’t handle – like I do with technical support. So if someone calls in to me and I can troubleshoot [their] phone and then they say thank you so much, [Interviewee Name]. You did a great job, but I need to pay my bill.

Now I have to kick them over to the billing department because I can't see their bill, I can't take payments. So I should not be penalized for transferring a call that I cannot handle, you know? I'm just saying every day that's happening and by the end of the week you might have to have transferred half a dozen calls. They say you're not helping the customer, but you could not and that's very frustrating and you get penalized for having too many transfers. [Interview, C4]

Together, our interview and focus group findings illustrate that union representatives perceived performance monitoring to be a significant source of workplace stress in their call centers. The factors exacerbating this were consistent with the relationships found in the statistical analysis but provide further insights by contextualizing these relationships. First, the use of performance monitoring information to discipline rather than develop employees' skills was viewed as harming well-being (or driving up stress). Second, the use of performance metrics that were seen as unfair or arbitrarily applied was a major concern to employees. In addition, these measures were related: performance monitoring was more likely to be viewed as "unfair" where it was discipline-based (rather than development-focused).

Collective voice and performance monitoring. The survey findings demonstrated the role of union instrumentality in reducing emotional exhaustion directly and indirectly through encouraging more developmental monitoring and improving the perceived fairness of metrics. The qualitative findings develop this further by showing exactly what types of union actions mattered to these relationships. We found that union representatives used three different approaches to help solve these problems: collective bargaining; the coordinated use of grievances and arbitration; and informal campaigns and actions.

First, union representatives sought to negotiate collective bargaining provisions on performance monitoring and discipline. The major provisions across contracts included the rights to prior notice before being monitored, to select the form of monitoring (e.g., side-by-side, remote, recorded), and to prompt feedback after monitoring has taken place, as well as limits on the number of monitored calls and/or sessions and protection from discipline as a result of monitoring. These have a long history. For example, in B1, after monitoring was expanded in the 1980s to include screen capture and call recording, the union negotiated protections against abuse of what was then new technology. This developed over time, to language in 2012 reading:

Employees will be informed of individual call monitoring the day that it occurs and can choose either electronic or side-by-side monitoring. Feedback will be provided to the employee by the end of the day. No

employee shall be disciplined as a result of monitoring, except in cases of gross customer abuse, fraud, violation of the privacy of communications, or if developmental efforts have not been helpful. Employees will not be disciplined or evaluated on calls sampled through process monitoring (not tied to the individual). Call recording must be shown on the employee's schedule and cannot exceed four hours in length. Employees will have the right to delete recorded calls and screen activity or save them for a short time for training. Recorded samples may only be used for training purposes. [Letter of agreement, B1]

Union representatives described the way in which these provisions could be useful in improving monitoring practices associated with workplace stress. A major priority was encouraging developmental monitoring. Some agreement provisions were negotiated specifically to encourage coaching. For example, A1 negotiated a side letter to their agreement whereby managers "have to coach and develop reps, they have to point out their weaknesses, they have to give an action plan on how to get better". This had been in place for over 25 years, and the union felt that it reoriented monitoring towards developmental rather than disciplinary purposes.

Other agreement provisions limited the use of monitoring for disciplinary purposes. C1's agreement obliged managers to provide feedback within a short window after monitoring was observed and stipulated that only eight monitored calls per month could be used for purposes that could result in discipline. As described by one union representative: "management may go through and listen to 20–25 calls on an individual. Generally this person will feel targeted and [management] would put them in disciplinary tracks to try to get them out." Thus, few calls could justify disciplinary action and the pursuit of such action had to be carried out imminently.

In contrast, representatives from B3 and C4 expressed concerns that there were no clear standards for exercising discipline. According to one union official, "when they say you need to use their first name, [this] could put you on the same level of discipline as opposed to cussing at a customer or inappropriate conversation. Both those things could lead you to a discipline depending on who is scoring you and observing the call."

Collective agreement provisions provided a tool for union representatives to improve the use and fairness of performance metrics, but they were not a perfect measure of how these practices were implemented in practice. One union representative noted that the union was trying to strengthen the language in the contract to stop management from exploiting ambiguity – suggesting a kind of "cat and mouse" game of ensuring compliance. Speaking in relation to B2 and C2, one union official discussed the use of "grey language" in the

agreements, indicating that “some of the grey words are ‘could’ and ‘may’. Those words are detrimental to us because they use it more to their advantage”.

Second, union representatives described how they used their own process of monitoring, grievances, and arbitration to make sure management implemented these provisions. A union official with A1 indicated that “we have files and files of grievances we have won. It’s great because members know we are here to protect them and fight for them, not just make rules.” D1’s shop steward described the process of challenging management as a union representative, involving a “first step grievance” to collect data from the company on why they were disciplined; then evaluating this to see if it was done fairly; and then requesting the discipline be removed if they determined it was unfair. If local management refused, the grievance was pushed up to a higher level. She gave an example:

I challenge everything. I had a grievance last week where I had an employee [...] she was put on a final warning because the company felt she didn’t make a quality offer – you hear the word? The operative word? A quality offer! [...] They nit-picked. They put her on warning for a year. So in the grievance I challenged them to say, show me where when you coached her on a call specific to the kind of call you took discipline on. [...] And so hence we’re battling it out right now [...] we’ve requested from the company, we want copies of her training, we want copies of her coaching, so forth and so on. [Interview Shop Steward, D1]

A union representative with C2 described their bargaining unit’s efforts to educate employees to promote compliance. In response to reports of aggressive call monitoring from workers, the unit encouraged members to monitor their screens and to provide the union with details on the calls for which they were disciplined. D1 pursued a similar strategy. They regularly communicated with employees to ensure that observations did not exceed the cap set in the collective agreement (30 observations per year).

Third, union representatives also highlighted the importance of informal actions taken to address the problems relating to how monitoring and discipline were used to manage performance. Information sharing and collaboration, or in some cases outright shaming of managers through local campaigns, were seen as being effective tools for persuading managers to engage in fairer forms of performance management.

In one example, the union at C1 set up a labor-management partnership committee with regular meetings to address problems of high absenteeism

rates. A union representative explained how the partnership was useful in addressing problems of monitoring fairness:

One of the conversations we had with the director was that the supervisors were in the cubicles all day monitoring calls, looking for problems to discipline workers, instead of getting out and helping them out. One of the things we did was tell the director that all these reports are not helping the workers, we need managers on the floor, visible, helping out with system issues, help through support, help to develop employees, walk them through calls and help them with sales. Determine where the issues are, you cannot just discipline employees thinking that they should just know everything you want them to know. [Focus group, C1]

Information sharing and relationship-building were perceived as useful in contexts where managers were receptive and responsive to employee needs. For example, one rep described how his team would negotiate informal flex-time arrangements with local managers to ensure that employees were not fearful of late arrivals and the implications for performance appraisal and the use of FMLA. According to this representative: “Now I can do that on an individual basis with some managers, but department wise they’d be like, ‘No, we’re not going to do that.’ Not institutionally, but I’ve been able to work those things out with local managers” (Interview, C1).

Frustrated with management, other union locals pursued more direct approaches. These constituted local campaigns to pressure managers into adopting better management practices. In one example from A1, the union gave out awards to managers with “bad management practices”, who would fail to provide constructive feedback or monitor excessively and then promote this in their pamphlets and newsletters to shame the managers [Focus group, A1].

Together, these are examples of the kinds of union actions that constitute “union instrumentality” and can be expected to vary more significantly at the local level, as well as based on an individual’s experience with union representatives. Collective agreements are an important tool for strengthening employee voice in the design and oversight of how performance metrics are used to evaluate employees. However, the agreements must be enforced, and their terms are often applied in creative ways. Grievances, arbitration, and informal consultation appeared to play a central role in encouraging more developmental performance monitoring that was viewed as fairly designed and executed by workers.

These qualitative findings serve two purposes. First, they validate our quantitative findings, illustrating that union instrumentality not only has important

effects on developmental monitoring (H2), but also the perceived fairness of performance metrics (H3). Further, the two aspects of performance monitoring are viewed by union representatives as closely and often sequentially related (H4). Second, these findings provide deeper insight into union instrumentality. They suggest worker views concerning union effectiveness in representing their interests and serving as a vehicle for collective voice are likely to be shaped by their experience with a range of interventions that are both formal (collective bargaining, grievances, and arbitration) and informal (union campaigns and other actions).

Discussion and Conclusion

This study sheds light on the effects of unions on employee well-being through mixed-methods research in the call center context. Findings are based on interviews and focus groups with union representatives and shop stewards on their own experiences representing workers, and analysis of worker surveys to investigate how these union actions relate to performance management practices, perceptions of fairness, and measures of well-being.

Consistent with past OB research, we found that both the developmental content and perceived fairness of performance monitoring reduced emotional exhaustion. Integrating an IR lens, we found that effective collective voice, measured as union instrumentality, played an important role in encouraging these “better” management practices. The qualitative interviews and focus groups enabled us to dig deeper into exactly which actions mattered to these dynamics. We found that unions sought to influence monitoring practices through different combinations of collective agreement provisions, consultation, and cooperation, as well as more militant actions such as filing frequent grievances and local campaigns to shame managers. These often relied on collective agreements as tools but required activism by shop stewards and local representatives to activate “union instrumentality” in encouraging more fair, consistent, and developmental monitoring.

Our findings make two contributions to the academic literature. First, we show that collective employee voice through unions can be an important contributing factor to employee well-being. These relationships represent a central assumed or explicit working hypothesis for much of the IR literature. However, findings have been mixed, especially in the more liberal US setting where union participation rights are weak. One reason may be that union effects are often measured bluntly by union presence or absence, studied across a range of workplaces with different task and skill characteristics. Another is that well-being has often been operationalized as job satisfaction or

included as a secondary measure in studies more directly concerned with performance outcomes (Guest 2017). Our research provides a useful bridge between this research tradition and OB scholarship on the antecedents of emotional exhaustion, demonstrating synergies between theoretical and empirical tools from both traditions. We not only develop and test generalizable hypotheses from past literature, but we also investigate “what unions do” in a US call center context, illustrating the importance of both formal and informal institutions to promoting workers’ psychological (rather than simply attitudinal) well-being.

Second, our findings suggest an important mechanism or path through which unions can improve well-being: through their impact on both the developmental content and perceived fairness of management practices. This answers calls to integrate institutional contexts more systematically in the study of HRM (Vincent et al. 2020), with context particularly lacking in OB analyses of employee voice (Kaufman 2015). Our findings suggest that collective voice can serve as an important “resource” to enable workers to deal with the escalating “demands” at work that drive up emotional exhaustion.

Our findings also have practical and policy implications. The high cost for firms, workers, and society associated with escalating stress at work are by now well-established, particularly in the US-based management literature (Pfeffer 2018). It is noteworthy that the solution is very rarely seen in collective action through union representation. Instead, authors promote enlightened management practices that invest in “positive cultures” and “inclusive leadership” (Lowe 2020) or through a growing industry of “workplace wellness programs” (Lieberman 2019). Research shows that these kinds of interventions are often ineffective, but they are also less likely to be adopted in the first place in frontline service workplaces, where jobs are more often lower wage and precarious (Solnet et al. 2020). Unions can play a particularly important role in addressing root causes of stress and burnout in these workplaces, with broader benefits to public health.

Limitations in our data suggest caution in interpreting and generalizing results. Most significantly, our quantitative analysis is based on a cross-sectional and single-source employee survey with a low response rate. We tried to offset the temporal weakness by drawing on qualitative findings from two different points in time and by structuring questions to allow us to analyze the impact of historical bargaining and representation dynamics on well-being. The qualitative findings concerning union efforts to influence performance monitoring, as well as their direct experience with how these practices are experienced by their members, provide additional justification for our model and support for the hypothesized relationships and triangulation of our results.

A further potential weakness is that we only have union represented call centers in our dataset. This does not allow us to compare performance monitoring practices and stress between non-union and union workplaces, where we might expect the union effect to be more significant – or to provide a better measure of the effect of collective voice compared to unilateral management decision-making. However, our research design does allow us to provide a more nuanced picture of differences in voice effects across union represented workplaces, within the same national union.

One final limitation is that we did not account for the role of dispositional factors, unlike many studies which highlight their effects on employee mental health (Bakker et al. 2006; Burisch 2002; Wu and Hu 2009). For example, research on the “locus of control” finds that employees who believe their life outcomes are associated with their own actions as opposed to “fate” or “chance” tend to be less bothered by stressors in the workplace (Gray-Stanley et al. 2010). In the call center context, however, it has been found that employees with an “internal locus of control” were more likely to quit and experience elevated levels of emotional exhaustion (Sawyer et al. 2009). Further work could be conducted to explore how dispositional factors, such as the locus of control, relate to union action and wellbeing in service work.

Further research could also investigate the factors that empower unions in collective bargaining over the introduction of HRM practices that affect worker well-being, including those that manage and monitor performance. Past research has shown that union capabilities can affect union influence at the bargaining table (Frost 2000; Lévesque and Murray 2010), and hence their effectiveness or “instrumentality” in helping workers solve real problems in the workplace. Our study provides a starting point for operationalizing these capabilities, through combining different data sources, including collective agreements and qualitative interviews. Future studies could combine survey information on well-being and union instrumentality with, for example, more precise measures of local union resources, grievance filing, and other informal representation activities to develop a better understanding of these relationships.

More broadly, our findings call for further research into institutional factors that support this kind of effective collective worker voice, through the lens of the social benefits associated with psychosocial well-being. In France, for example, a national collective agreement on harassment and violence at work has established a legal requirement that employers must evaluate psychosocial risks and negotiate agreements to mitigate those risks with worker representatives (Palpacuer and Seignour 2020). These kinds of formal institutional supports for collective voice may also be an important tool to tackle the high rates of stress and burnout in many US jobs and industries. In addition, most

recently, the surge in employer use of electronic performance monitoring technologies during the COVID-19 pandemic, as large numbers of employees move to working from home, provides a distinctive opportunity to study the role of unions in negotiating new worker protections under particularly challenging conditions.

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