



Using the Case Study Method to Examine the Implications of Public Sector Reform for Public Sector Unions

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Abstract

Several decisions were made in the process of conducting this research. First, I had to state the research problem. The research focused on public sector reform and its implications for public sector unions in Zambia. Second, a decision was made on the research approach. The qualitative approach was adopted so as to understand the effects of public sector reforms on trade unions. Third, I selected the case study method to allow me to collect detailed information on the behavior of a particular union within the context of public sector reform. The union that was selected is the Civil Servants and Allied Workers Union of Zambia. The Civil Servants and Allied Workers Union of Zambia was selected because of its unique characteristics. It was the largest public sector union in Zambia when the first reform programs were implemented. It was also the only union that could be seen responding strategically to the reform of the public sector. Fourth, I had to identify the sources of data. These included documents, union leaders, and managers of public institutions. A combination of multistage, purposive, and snowball sampling methods was used to select the participants. This approach to sampling was adopted because the target population was somewhat hidden. I also faced the problem of some potential participants refusing to participate in the research. Such potential participants were replaced with those willing to participate. Through the case study method, insights were gained into the effects of public sector reforms on the Civil Servants and Allied Workers Union of Zambia and how the union responded to the same reforms.

Learning Outcomes

By the end of this case, students should be able to

- Analyze various decisions that are made in the process of conducting research
 - Apply the case study method to different research cases
 - Explain the strengths and weaknesses of primary and secondary sources of data
 - Compare and contrast sampling challenges faced in two or more research settings
 - Explain how an ethical research project is managed
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Project Overview and Context

The process of conducting research requires several decisions to be made. First and foremost, the researcher is supposed to state the research problem. This involves indicating what is wrong out there that needs to be investigated. This is achieved by reviewing the literature on the subject of the researcher's interest and identifying the gap that needs to be filled. The focus of this research case is on public sector reform and its implications for trade unions in the public sector in Zambia. This subject area was chosen after reviewing the literature on the concepts of public sector reform and trade unions. The term *public sector reform* can

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be defined as planned reorganization of public institutions with the aim of increasing effectiveness, efficiency, competence, financial prudence, and responsiveness to the needs of citizens (Omoyefa, 2008; Pollitt & Bouckaert, 2011). So far, the world has witnessed two generations of public sector reform. These are new public management (NPM) and post-NPM reforms. On one hand, NPM reforms emphasize the establishment of autonomous institutions whose operations are driven by market forces. This generation of reforms was predominant in the 1980s and 1990s. On the other hand, post-NPM reforms emphasize collaboration in the processes of policy formulation and implementation. This generation of reforms emerged in the 2000s (Christensen & Lægreid, 2007).

The term *trade union* refers to an organization of employees which aims to represent and promote the interests of its members by negotiating with or challenging the power of employers (Farnham & Pimlott, 1990; Marx, 1976/1982; Republic of Zambia, 1997). The literature shows that while public sector reform has the potential to enhance efficiency and effectiveness of the public sector, in particular, and the economy, in general, it negatively affects trade unions in the public sector. When market-friendly policies such as decentralization, privatization, contracting-out, and competition are implemented, the public sector loses jobs. This results in public sector unions losing membership, income, and bargaining power (Anderson, Griffin, & Teicher, 2002; Brewster, Dempsey, & Hegewisch, 2001; Connoley, 2008). Under such conditions, the survival of these unions is threatened. Nonetheless, the literature shows that trade unions have the ability to respond strategically to public sector reforms (Anderson et al., 2002; Brewster et al., 2001; Connoley, 2008). However, the literature is not comprehensive. It focuses on trade union response to NPM and leaves out the response to post-NPM reforms. In addition, the literature focuses mainly on the experiences of developed countries. There is limited information about the response by trade unions to public sector reform in developing countries. This is the gap that stimulated the interest to conduct a research of this nature in developing countries.

Having identified the gap in the literature, a decision had to be made on the exact country where the research was to be conducted. Zambia was chosen because it is one of the African countries that has implemented the most comprehensive public sector reform programs and projects. These include the privatization program, Public Service Reform Program, Public Service Capacity Building Program, Public Service Management program, and a number of public–private partnership projects. A decision was also made on the research approach to be adopted. By research approach, we refer to the plan of the research. Creswell (2014) identifies three research approaches, namely, qualitative, quantitative, and mixed methods. In this research case, the qualitative approach was adopted. This approach was adopted because it enables the researcher to become knowledgeable of the context within which the participants operate and how this context affects their behavior (Berg & Latin, 2008; Maxwell, 2013).

After choosing the research approach, the next decision involved selecting the research method. By research method, we refer to the form that the research takes. According to Yin (2014), research methods take the forms of experiments, surveys, archival analyses, histories, and case studies. This research case used the case study method focusing on the Civil Servants and Allied Workers Union of Zambia (CSAWUZ) in Lusaka district under the rubric of public sector reform. The case study method was chosen for four major

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reasons. First, it allows the researcher to collect detailed information on the behavior of the social unit under investigation. A social unit can be a person, an institution, or a community (Kothari, 2004/2012). This reason was important as it allowed me to collect information on the behavior of CSAWUZ within the context of public sector reform. Second, the case study method helps the researcher to understand the history of the social unit and its interaction with the environment (Kothari, 2004/2012; Soy, 1997; Stake, 1995). This helped me to understand how CSAWUZ was affected by public sector reforms and how it responded to the same reforms. Third, the case study method enables the researcher to identify challenges faced by the social unit as it interacts with the environment (Kothari, 2004/2012). In line with this principle, this research project managed to identify challenges faced by CSAWUZ as the public sector gets reformed. Fourth, the case study method enables the researcher to make recommendations on how to deal with the challenges faced by the social unit (Kothari, 2004/2012). This reason was vital as it enabled me to make recommendations that would strengthen public sector unions in the era of public sector reform.

Stake (1995) indicates that a case is studied because of its unique characteristics. This principle was applied in the selection of the CSAWUZ. This union was selected because it had two unique characteristics. First, it was the largest public sector union in the country when the first reform programs were implemented. These included the privatization program and the Public Service Reform Program. In 1995, the membership of the Civil Servants Union of Zambia (CSUZ), now CSAWUZ, was 65,000. In the same year, the other public sector unions such as the National Union of Public Service Workers had 34,000 members and the Zambia United Local Authority Workers Union had 22,000 members (Koyi, 2010). Second, after the implementation of the reform programs, the CSUZ was the only union that could be seen responding strategically to the reform of the public sector. This was shown by the change of its name from CSUZ to CSAWUZ. This change of name meant that the membership of the union was no longer confined to civil servants but extended to allied workers. In the Zambian context, civil servants are defined in terms of central government workers who are engaged on permanent and pensionable terms of employment. The allied workers who are organized by the CSAWUZ are workers in organizations related to the civil service such as “the Zambian Public Service and Grant Aided Institutions and employees of government departments turned [into] parastatal bodies and organizations, Board Authorities, Agencies and Non-governmental Organizations” (CSAWUZ, 2014, p. 1). Therefore, the selection of the CSAWUZ offered the best opportunity for the researcher to understand the implications of public sector reform for public sector unions in Zambia.

The research was conducted in Lusaka district for two reasons. First, Lusaka is the most populous district in Zambia. In 2010, Lusaka district had a population of 1,747,152, with an annual growth rate of about 5%. This population was against the national population of 13,092,666 (Central Statistical Office, 2012). This shows that 13.3% of Zambia’s population resides in Lusaka district. This kind of population put managers of public institutions under a lot of pressure to try different types of reforms to promote efficiency and effectiveness of service delivery. However, these reforms negatively affect trade unions. The affected areas include union membership, governance process, and collective bargaining. As such, the unions are forced to make strategic decisions to adapt to the changing circumstances. These decisions range from short- to long-term decisions (Kochan, Katz, & McKersie, 1994; Kochan, McKersie, & Cappelli, 1983). Therefore, conducting this research

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in Lusaka district enabled the researcher to gain a better understanding of the implications of public sector reform for trade unions in Zambia. Second, the research was conducted in Lusaka because this is where the headquarters of the CSAWUZ are based. This location helped me to draw a sample representing the four key levels of the union's organizational structure. These are national, provincial, branch, and workplace levels. This kind of sample representation ensured that the data collected from leaders at one level of union organization were supplemented by those from the other levels. This, in turn, improved the quality of the data in terms of reliability and validity.

Research Design

First and foremost, the design of the research was driven by the desire to collect in-depth information on public sector reform and its implications for trade unions in the public sector in Zambia. This entailed gaining insights into four key issues, namely, the dimensions of the reforms implemented in Zambia, environmental factors influencing their implementation, the effects of the reforms on trade unions, and the strategic responses by the unions to the same reforms. The dimensions of the reforms that were examined are NPM and post-NPM reforms. The interest here was to understand the programs and projects that were adopted in each generation of the reforms and how they were implemented. Environmental factors that were covered are economic conditions, ideological changes, and the actions of stakeholders both domestic and international. These factors were chosen so as to acquire knowledge of their influence on the reforms.

The effects of the reforms on trade unions were examined in relation to union structure, union governance, and collective bargaining structure. The term *trade union structure* may be defined as “those sections of the labour force which a given organization seeks to recruit” (McCarthy, 1985, p. 125). A trade union can confine its recruitment to workers from one company, occupation, industry, or sector or extend to related fields. In this regard, it was necessary to understand how the reforms affected the ability of the unions to recruit members. Union governance relates to the management of union activities and relationships. It includes the roles of the leadership and the membership in directing union activities and the extent to which union policies and decisions reflect the interests of the membership (Salamon, 2000). At this stage, the interest was to establish the extent to which the reforms affected the roles of union leaders and their members. Collective bargaining structure can be defined as “the scope of the employees and employers covered or affected by the bargaining agreement” (Katz, Kochan, & Colvin, 2008, p. 177). A bargaining agreement can cover employees from one company, employees from one occupation who are engaged by different employers, or multiple occupations and multiple employers in one or more industries. An analysis of the bargaining structure was included in this research so as to understand the extent to which the reforms affected the bargaining power of the unions. The strategic responses by the unions were considered at two levels, namely, before and after the implementation of the reforms. Before the implementation of the reforms, particular attention was paid to decisions made by the unions to secure benefits for workers. After the implementation of the reforms, the focus was on decisions made by the unions to mitigate the negative effects of the reforms. Essentially, this was meant to establish whether or not public sector unions in developing countries had the capacity to survive in the era of public

sector reform.

As this research adopted the qualitative approach, there was flexibility in the process of conducting it (Berg & Latin, 2008). This was applied mainly at the stages of sampling and data collection. At the sampling stage, the sample size was not predetermined. This is because a complete list of potential participants in Lusaka district could not be obtained to enable predetermination of the sample size. As such, sampling was done in the process of data collection. Flexibility was also applied at the stage of data collection so that the researcher could ask participants additional questions to get clarification and more details about the issues under investigation.

Research Practicalities

After identifying the issues to be investigated and the research method, the researcher has the task of identifying the sources of data. In this research project, two types of data were collected. These are secondary and primary data. Secondary data refer to information that has been collected and analyzed by other researchers. This type of information is always documented. The sources of secondary data in this research were textbooks, journal articles, working papers, research reports, conference papers, workshop papers, seminar papers, dissertations, and theses. These documents were obtained from individuals, libraries, and the Internet. Secondary data were gathered to provide insights into what was already known about the implications of public sector reform for trade unions in the public sector. These data also helped with the historical background and to identify gaps in the existing literature.

Primary data are information that has not been collected or analyzed by other researchers. This type of data can be documented or undocumented. The sources of primary data in this research were original program documents, acts of parliament, union constitutions, union leaders, and managers of public institutions. Original program documents and acts of parliament were obtained from managers of public institutions. The process of obtaining these documents involved making formal requests, in writing, to heads of selected public institutions. Appointments were then made and access to the documents given. Union constitutions were obtained from the headquarters of the CSAWUZ. The process of obtaining these constitutions began by writing a formal letter to the General Secretary of the CSAWUZ requesting for information on public sector reform and the CSAWUZ. Permission was granted and I was referred to the Director of Research and Information at the CSAWUZ who then gave me the requested documents.

However, the documented data were not enough to explain the implementation of public sector reforms in Zambia and their implications for the CSAWUZ. As such, there was need for undocumented data to be collected. Undocumented data were necessary so as to gain a deeper understanding of the implications of public sector reform for trade unions in the public sector in Zambia. This type of data was collected from a sample of 25 informants comprising five managers of public institutions and 20 leaders of the CSAWUZ. On one hand, a sample of five managers of public institutions was selected because it was good enough to provide information on the implementation of public sector reform programs and projects in Lusaka district.

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On the other hand, a sample of 20 leaders of the CSAWUZ was selected because it was the most suitable sample to select based on the challenges faced in the sampling process. These challenges are discussed in the next section.

The five managers of public institutions were selected using the method of multistage sampling (also known as cluster sampling). This method involves selecting the sample in stages. The five managers were selected in two stages. The first stage involved selecting a sample of four institutions out of a population of 67 public institutions from which the CSAWUZ drew its membership in Lusaka district. The categories of these institutions were government ministries, central government offices and departments, public hospitals and clinics, and semi-autonomous government institutions. At this stage, the lottery method was used to draw a sample of four institutions. The application of the lottery method was done in such a way that the names of the 67 public institutions were written on similar pieces of paper. The pieces of paper were then put in a container and mixed completely. Thereafter, four pieces of paper were drawn. These constituted the sample of public institutions from which four managers would be drawn (i.e., this was the planned sample of managers of public institutions). The selected institutions were Ministry of Labor and Social Security, Chainama Hills College Hospital, Chilenje Clinic, and Lusaka Business and Technical College. The lottery method was used to reduce bias in sampling. This was achieved by giving each institution an equal chance of being selected.

The second stage involved selecting five managers from the four sampled public institutions. At this stage, purposive or judgmental sampling was used. This entailed the researcher using his judgment to select managers considered to be more knowledgeable of the reform strategies implemented at the sampled institutions. One manager was chosen from each of the four sampled institutions. However, at one institution, two managers were selected. This is because the earlier selected manager could not provide all the required information. As such, the researcher was referred to another manager who was able to provide the missing information. This meant that the final sample of managers of public institutions was five instead of four as earlier planned. Purposive sampling was used to select managers of public institutions due to two reasons. These are as follows:

- i. Not all managers were familiar with the reform strategies implemented at their institutions. As such, it was important for the researcher to use his judgment to identify managers who were familiar with the issues under investigation.
- ii. A complete list of managers of public institutions from which the CSAWUZ drew its membership in Lusaka district could not be obtained. Therefore, probability sampling methods could not be applied at this stage (i.e., methods that give each member of the population an equal chance of being included in the sample).

The sample of CSAWUZ leaders consisted of four former and 16 current leaders drawn from the four key levels of the union's organizational structure. These are national, provincial, branch, and workplace levels. One current leader at the national level and another at the provincial level were selected using purposive sampling. These leaders were selected because of their familiarity with the operations of the union at these levels. The current leaders of CSAWUZ at branch and workplace levels and former leaders were chosen

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using the snowball sampling method (SSM), also known as chain-referral sampling. This method involves the researcher identifying a member of the population under investigation and asking them for the name of another member. Each member who is contacted is asked the same question (Cohen & Arieli, 2011). In this research, the process of identifying union leaders started with the General Secretary of CSAWUZ referring me to the union's Director of Research and Information who in turn referred me to another union leader. Each leader who was contacted was asked for names, workplace locations, and/or mobile phone numbers of other leaders. The SSM was used to sample current union leaders at branch and workplace levels and former leaders because they were difficult to locate. On one hand, current leaders at these levels could not be located easily because the CSAWUZ did not have leadership representation in some of the institutions where it drew membership. On the other hand, former leaders were difficult to locate because most of them had retired and their whereabouts were unknown. Other former leaders had died. The purpose of selecting former leaders was to collect information on union organization in the NPM era, whereas the current leaders were selected to provide information relating to the post-NPM era.

There were also ethical considerations that were essential in the process of conducting the research. These were as follows:

- Requesting, in writing, for permission to conduct the research at the sampled institutions. However, some institutions took too long to respond to my request. I had to wait for several weeks and make follow-up visits for permission to be granted;
- Informing all the participants about the objectives of the research, sampling, and data collection methods;
- Allowing all the participants to ask any questions about the research;
- Asking all the participants, in writing, for their consent. Despite informing them about the research, some participants were reluctant to give their consent in writing for fear that their identity would be disclosed. I had to assure them of their anonymity for them to consent;
- Telling all the participants that their participation in the research was voluntary and that they had the right to withdraw their consent whenever they felt like doing so;
- Maintaining the anonymity of all the participants. In line with this consideration, job titles were used to identify the informants;
- Maintaining honesty and integrity in the processes of data collection, analysis, and presentation.

Method in Action

The selection of the case study method helped to collect detailed information on the history of the CSAWUZ, its interaction with public sector reforms (i.e., both NPM and post-NPM reforms), the challenges presented by the reforms, and the responses by the CSAWUZ to the same reforms. The union responses were understood both before and after the implementation of the reforms. The case study method also enabled me to make recommendations on how to strengthen public sector unions in the era of public sector reform. The use of

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purposive sampling enabled me to identify gatekeepers in institutions being researched and to collect vital information including documents. In addition, the gatekeepers played a major role at the stage of making referrals to other participants in the research. Equally important was the use of SSM. This method allowed me to sample participants who were hidden and difficult to locate, especially former leaders who had retired from both the union and public service and their whereabouts were unknown.

The use of the case study method had its own weaknesses. The major weakness was that the research could only be conducted in public institutions where the CSAWUZ had representation. This resulted in public institutions that did not have the representation of CSAWUZ being left out of the sampling frame. The other weakness was associated with the SSM. Despite the names and workplace locations of some union leaders being given, they could not be contacted. This was due to three main reasons. These are as follows:

- They were on leave;
- They were attending to other activities outside their workplaces;
- The workplace was closed. This was the case with learning institutions that were on recess.

Therefore, such leaders were replaced with those who were accessible. There were also other union leaders who were contacted but refused to participate in the research. The reasons for their refusal included the following:

- They were busy with other activities;
- They claimed that they were new in their leadership positions and that they were not familiar with the organization of the union;
- They wanted to be paid some money for them to participate;
- Some of the former leaders had joined other unions and refused to participate arguing that they were not interested in talking about their former union.

All the leaders who refused to participate in the research were replaced with those willing to participate. Because of the refusal by some leaders to participate and the challenges of locating them, it was difficult to increase the sample size.

Practical Lessons Learned

The first lesson learned is that the case study method allows the researcher to collect detailed information about a social unit and its interaction with the environment (i.e., economic, political, social, and cultural conditions, among others). This entails understanding the changes in the environment within which the social unit operates, their effects on the social unit, decisions made by the social unit to adapt to the changing environment, and challenges faced by the social unit to adapt to the changing environment. Equipped with this kind of information, the researcher is able to make recommendations on how to enhance the adaptation of the social unit to the changing environment. This is the kind of information obtained by this research project

regarding public sector reforms and their implications for the CSAWUZ.

The second lesson is that in order for a deeper understanding of a phenomenon to be gained, the case study must focus on a social unit that has unique characteristics. These characteristics can be viewed in terms of size, transformation, and geographical location. For instance, the purpose of this research project was to examine the implications of public sector reform for public sector unions in Zambia. Nonetheless, the research did not cover all the public sector unions in Zambia. Instead, it focused on the CSAWUZ, which was the largest public sector union in the country when the first reform programs were implemented. Similarly, the research did not cover all the districts in Zambia. Instead, it was confined to Lusaka, which is the most populous district in Zambia. Therefore, the selection of CSAWUZ in Lusaka district enabled the researcher to gain a better understanding of the implications of public sector reform for public sector unions in Zambia. This level of understanding would not have been reached if the research focused on a smaller union and/or a less populous district.

The third lesson is that the use of the case study method requires the researcher to identify gatekeepers in institutions being researched. Gatekeepers are important because they help the researcher to collect vital information including documents. In addition, they help with referrals to other participants in the research. The fourth lesson is that snowball sampling is the most appropriate method to use when dealing with a hidden population. By hidden population, we refer to a population whose members are difficult to locate. Through snowball sampling, the researcher can ask participants for the names and contact details of their colleagues. The sample is then drawn from the located members.

Conclusion

This research case shows that the process of conducting research requires several decisions to be made. First and foremost, the researcher is supposed to state the research problem. This is achieved by reviewing the literature on the subject of the researcher's interest and identifying the gap that needs to be filled. In this research project, the focus was on the implications of public sector reform for public sector unions in Zambia. The next decision involves choosing the research approach. This research case adopted the qualitative approach. This was followed by the selection of the research method. The case study method was used in this research project. The case study method involves the collection of detailed information on the behavior of the social unit under investigation. It entails understanding the history of the social unit, its interaction with the environment, and the challenges it faces as it interacts with the environment. The environment can be viewed in terms of economic, political, social, and cultural conditions, among others. The social unit that was investigated using this method was the CSAWUZ within the context of public sector reform. Through the case study method, insights were gained into four key issues, namely, the dimensions of the reforms implemented in Zambia, environmental factors influencing their implementation, the effects of the reforms on the CSAWUZ, and the strategic responses by the CSAWUZ to the same reforms.

This case study reveals that in order for a deeper understanding of a phenomenon to be gained, the case

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study must focus on a social unit that has unique characteristics. For instance, instead of covering all the public sector unions in Zambia, this research project focused on the CSAWUZ because it was the largest public sector union in the country when the first reform programs were implemented. In addition, this case study shows that after identifying the issues to be investigated and the research method, the researcher should identify the sources of data. At this stage, the researcher is supposed to use their judgment to identify gatekeepers in institutions being researched. Gatekeepers are important because they help the researcher to collect vital information including documents. They also help with referrals to other participants in the research. The referral or SSM is helpful when dealing with a hidden population. It allows the researcher to ask participants for the names and contact details of their colleagues. The sample is then drawn from the located members.

Furthermore, this case study indicates that even if the members of the target population are known, they may not be willing to participate in the research. This is due to a variety of reasons such as lack of time, lack of interest, lack of information, and the desire to be paid some money for their participation. To increase the level of participation and quality of the data, there are ethical considerations that are essential in the process of conducting research. They include informing the participants about the research project, asking for their consent, and maintaining their anonymity.

Exercises and Discussion Questions

1. Analyze the various decisions that were made in the process of conducting this research;
2. Apply the case study method to your research project;
3. Compare and contrast the characteristics of the CSAWUZ and the case that your research project is focusing on;
4. Explain the strengths and weaknesses of primary and secondary sources of data for your research project;
5. Compare and contrast sampling challenges faced in this research case and your research project;
6. Explain how ethical issues in your research project are going to be addressed.

Further Reading

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Web Resources

<http://etd.uwc.ac.za/xmlui/handle/11394/4886>

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