

# **Teaching Collective Bargaining Through Simulation: A Design Analysis and Seven-Phase Negotiation Laboratory for Labor Relations Courses**

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## **Abstract**

This study examined the collective-bargaining role-play embedded in Labor Relations and Negotiation and developed a more assessable negotiation laboratory for undergraduate labor-relations instruction. Structured qualitative document analysis focused on Chapter III, Labor Organizations, and Chapter VI, Conflict and Negotiation, while tracing objectives, role information, bargaining issues, decision points, outputs, and debrief questions. The source simulation assigns union and employer bargaining committees, union members, and nonunion bargaining-unit employees. The union seeks a five-percent wage increase and two additional vacation days; management authorizes no more than three percent but may offer four percent if one vacation day is surrendered. Teams prepare separately, bargain for five minutes, present a tentative deal for a union-member vote, and discuss representation and satisfaction. The exercise's strengths are recognizable stakeholder roles, asymmetrical mandates, package trade-offs, a ratification step, and reflection on voice. It creates a compact experience of distributive tension and demonstrates that negotiators are accountable to constituencies. Its instructional evidence is nevertheless weak. The scenario provides no costing data, bargaining history, contract language, ground rules, legal and ethical briefing, priorities, reservation points, alternatives to agreement, caucus protocol, impasse procedure, observer instrument, written memorandum, or analytic rubric. The two-variable design encourages splitting differences more than diagnosing interests or creating value, while the five-minute deadline compresses preparation, exploration, package

bargaining, and documentation. The manuscript discusses active listening and conflict types elsewhere but does not deliberately integrate those skills into the bargaining exercise. It also supplies no baseline, post-simulation assessment, performance criteria, learner data, or field-test evidence; learning effectiveness cannot be claimed. Drawing on collective-bargaining standards and negotiation-simulation research, the article proposes a seven-phase laboratory: doctrine and context, role preparation, costing and mandate design, bargaining protocol, negotiation and caucus, tentative agreement and ratification, and structured debrief with individual transfer. The revised design preserves the source's accessible role-play while adding authenticity, process control, comparable evidence, feedback, and staged validation.

**Keywords:** collective bargaining; negotiation simulation; experiential learning; role-play; labor relations education; instructional design

## Introduction

Collective bargaining is both a legal institution and a demanding communication practice. Learners must understand representation, bargaining subjects, mandates, proposals, concessions, package construction, impasse, ratification, and contract administration. They must also listen, question, calculate, document, and remain accountable to constituents. A lecture can name these elements, but a well-designed simulation can make their interdependence observable.

International labor standards frame collective bargaining as voluntary negotiation between employers or their organizations and workers' organizations. Convention No. 98 calls for measures that encourage machinery for voluntary negotiation, while Convention No. 154 and Recommendation No. 163 elaborate measures that can promote collective bargaining across differing industrial-relations systems (International Labour Organization, 1949, 2015). A classroom simulation should therefore represent bargaining as a

process of authorized, informed, and accountable agreement-making rather than a quick exchange of numbers.

Negotiation educators widely use role-play, but participation alone does not guarantee learning. Druckman and Ebner (2013) found that simulations have only limited advantages unless their design, conduct, and use are improved. Engagement depends on authenticity and vested interest (Poitras et al., 2013), and educational value increases when preparation, feedback, debriefing, and conceptual framing are deliberate. Collective-bargaining simulations can also model two levels of accountability when bargaining teams must secure constituent approval (Schilling et al., 2006).

The source manuscript, *Labor Relations and Negotiation* by Ernesto V. Tumacole Jr., contains a bargaining role-play in the labor-organizations chapter and an active-listening exercise in the conflict chapter (Tumacole, n.d.). This article analyzes the role-play as written and proposes a revised laboratory. Because the manuscript supplies no learner-performance or comparison data, it does not test the simulation's effectiveness.

## **Purpose and Research Questions**

The study asked: (1) What bargaining concepts, roles, decisions, and outputs are represented in the source simulation? (2) What forms of distributive and integrative reasoning can the scenario elicit? (3) What evidence could an instructor use to assess preparation, process, agreement quality, constituency accountability, and reflection? and (4) How can the exercise be redesigned as a realistic, repeatable, and research-ready negotiation laboratory?

## **Methods**

### **Design and Corpus**

The study used structured qualitative document analysis. The primary corpus was the collective-bargaining activity in Chapter III and the conflict, questioning, and active-listening material in Chapter VI. The complete 104-page manuscript was reviewed for curricular context, but only components directly affecting bargaining preparation, performance, ratification, or debriefing were coded.

The unit of analysis was a design element: learning objective, stakeholder role, information item, issue, mandate, decision point, time rule, product, vote, or reflection question. The scenario assigns three learners to a union bargaining committee, three to management, five to nonunion bargaining-unit roles, and the remainder to union-member roles. It supplies two numerical issues, separate committee instructions, a five-minute bargaining period, a union-member vote, and two debrief prompts.

**Table 1**

*Inventory of the Source Collective-Bargaining Simulation*

| Design element                   | Observed count | Source specification                                                                       |
|----------------------------------|----------------|--------------------------------------------------------------------------------------------|
| Stakeholder groups               | 4              | Union committee, employer committee, union members, and nonunion bargaining-unit employees |
| Committee negotiators            | 6              | Three union and three employer committee members                                           |
| Bargaining issues                | 2              | Across-the-board wage percentage and annual vacation days                                  |
| Union opening goals              | 2              | Five-percent raise and leave increase from five to seven days                              |
| Management mandate               | 2 levels       | Up to three percent; four percent only with leave reduction from five to four days         |
| Table time                       | 5 minutes      | One continuous period; no specified caucus or drafting time                                |
| Approval event                   | 1              | Union-member vote after a tentative deal                                                   |
| Debrief prompts                  | 2              | Dissatisfied members and the experience of nonunion employees                              |
| Costing/rubric/written agreement | 0              | No quantitative fact sheet, scoring tool, or required contract language                    |

## Analytic Framework

Coding categories were role authenticity; information structure; issue architecture; distributive and integrative potential; constituency accountability; communication and process control; written outputs; assessment and feedback; inclusion and ethics; and publication readiness. A design element was coded as explicit only when the manuscript provided a clear instruction, rule, or artifact. An element was not inferred from what an instructor might add orally.

The analysis also distinguished activity from evidence. Speaking during a role-play is participation; a bargaining plan, costing worksheet, observation record, tentative agreement, ratification statement, or reflective analysis is inspectable evidence. This distinction matters because experiential learning requires structured reflection and conceptualization, not experience alone.

### **Procedure and Trustworthiness**

The first pass reconstructed the scenario in chronological order. The second mapped information access, authority, and decisions for each role. The third examined whether the issue design could support interests, options, packages, trade-offs, and constituency approval. The fourth compared the design with negotiation-simulation literature and collective-bargaining standards. The final pass audited objectives, instructions, outputs, assessment, editorial clarity, and accessibility.

One analyst coded one version, and no classroom was observed. The article therefore reports design affordances and constraints rather than effects on negotiation skill. Counts are descriptive, and recommendations identify testable design changes. The proposed laboratory should be piloted before causal or comparative claims are made.

## **Results**

### **Scenario Architecture**

The simulation has a clear social structure. Two committees represent union and management, union members form a ratifying constituency, and nonunion bargaining-unit employees experience the consequences without participating in the union meeting or vote. This design exposes a two-level feature of bargaining: negotiators must reach a cross-table deal and then obtain internal approval.

Information is intentionally asymmetric. The union asks for a five-percent raise and an increase from five to seven vacation days. Management may offer no more than three percent, but it may reach four percent if employees give back one vacation day, reducing annual leave from five days to four. The parties therefore have incompatible opening positions and a potential package trade-off.

The activity sequence is committee preparation, bargaining, tentative agreement, union vote, reporting of results, and reflection. It is compact enough for a single class and gives each large group a recognizable purpose. The questions about dissatisfied union members and nonunion employees direct attention to representation, voice, and the difference between bargaining participation and bargaining-unit coverage.

### **Learning Affordances**

The scenario can reveal several foundational concepts. Separate mandates introduce authority and reservation boundaries. Two issues permit package proposals rather than one-item haggling. Ratification shows that committee agreement is provisional until the represented constituency acts. The nonunion role creates a basis for discussing legitimacy, information, and the effects of collective outcomes on individuals who did not vote.

The design also creates a visible distributive tension. Any wage increase imposes cost on management, and vacation change is framed as a concession or giveback. Learners may practice opening proposals, concessions, caucusing, and closing. An instructor can use differences among teams to discuss anchoring, reciprocity, package construction, and constituency pressure.

These opportunities are only latent because the manuscript does not name or assess them. The conflict chapter defines substantive, process, value, misperception, and relationship conflict and includes an active-listening exercise, yet the bargaining instructions do not require open questions, paraphrasing, issue diagnosis, interest statements, or relationship repair. The strongest communication material is adjacent to, rather than integrated with, the negotiation task.

### **Constraints on Authenticity and Evidence**

The issue architecture is too thin for a robust bargaining laboratory. Two variables with no cost data, productivity information, workforce profile, bargaining history, market condition, contract term, or operational constraints make it difficult to distinguish strategic analysis from intuitive compromise. Learners cannot calculate the annual cost of a percentage increase, value a

vacation day, compare packages, or explain how an agreement affects both parties.

Preparation is under-specified. The role cards give desired outcomes but do not distinguish priorities, targets, reservation points, authority, interests, objective criteria, alternatives to agreement, or information that may be disclosed. No ground rules address spokespersons, agenda, caucuses, tentative language, good-faith conduct, time management, or confidentiality. The five-minute deadline is insufficient for opening statements, information exchange, exploration, package bargaining, drafting, and clarification.

The ratification step is conceptually valuable but procedurally incomplete. There is no written tentative agreement, explanation by the union committee, opportunity for member questions, voting rule, quorum, outcome threshold, or process after rejection. Management's own approval process is absent. A two-level simulation becomes more realistic when both sides have principals or commissions that approve the result, as demonstrated in learner-expert collective-bargaining designs (Schilling et al., 2006).

Assessment evidence is minimal. The manuscript asks how many members were unhappy and how nonunion employees felt, but it provides no observer checklist, bargaining-plan template, scoring rubric, peer feedback, individual reflection, or concept check. Teams can reach different deals for different reasons, yet an instructor has no common evidence to distinguish preparation, listening, analysis, strategy, ethical conduct, package quality, or learning transfer.

### **A Seven-Phase Negotiation Laboratory**

Phase 1 establishes doctrine and context. Learners review collective-bargaining purpose, representation, bargaining subjects, negotiation ethics, and the difference among position, interest, mandate, and agreement. A short pre-assessment identifies misconceptions. Phase 2 assigns roles and requires each team to translate confidential information into a bargaining plan containing interests, priorities, targets, reservation points, alternatives, authority, questions, and an opening package.

Phase 3 adds costing and mandate design. A shared fact sheet supplies workforce size, payroll, leave usage, productivity, inflation, comparable terms, and operational constraints. Each side receives different confidential assumptions but must show calculations. Phase 4 establishes protocol: agenda, spokespersons, note-taking, issue order, caucus rules, package labeling, tentative language, time blocks, and respectful-conduct standards.

Phase 5 conducts negotiation in timed rounds with at least one caucus and a visible bargaining record. Observers code questions, listening, interest exploration, criteria, concessions, package movement, relationship management, and accuracy. Phase 6 requires a signed tentative memorandum, economic-cost summary, union ratification, management approval, and a defined response to rejection or impasse. This makes agreement quality and constituency accountability inspectable.

Phase 7 uses a structured debrief and individual transfer task. Teams compare agreements and processes, reconstruct turning points, identify value created or lost, evaluate fairness and legitimacy, and connect behavior to concepts. Each learner then analyzes a new mini-case or writes a revised strategy. Research on negotiation education cautions that simulations need purposeful debriefing and conceptual work; designing or redesigning simulations can itself deepen learning (Druckman & Ebner, 2013).

**Table 2**

*Seven-Phase Collective-Bargaining Laboratory*

| Phase | Learning focus         | Required activity                                                                           | Evidence                           |
|-------|------------------------|---------------------------------------------------------------------------------------------|------------------------------------|
| 1     | Doctrine and context   | Review purpose, representation, subjects, ethics, and key terms                             | Concept pre-assessment             |
| 2     | Role preparation       | Define interests, priorities, targets, reservations, alternatives, authority, and questions | Confidential bargaining plan       |
| 3     | Costing and mandates   | Analyze payroll, leave, productivity, comparables, and constraints                          | Costed package and mandate sheet   |
| 4     | Process protocol       | Set agenda, roles, caucus, notes, issue order, time, and conduct rules                      | Signed ground rules                |
| 5     | Negotiation and caucus | Exchange information, explore interests, make packages, and record movement                 | Observer record and bargaining log |

| Phase | Learning focus         | Required activity                                                              | Evidence                              |
|-------|------------------------|--------------------------------------------------------------------------------|---------------------------------------|
| 6     | Agreement and approval | Draft terms, cost settlement, present to principals, ratify or address impasse | Tentative memorandum and vote record  |
| 7     | Debrief and transfer   | Compare strategies, outcomes, legitimacy, and lessons; solve a new case        | Individual analysis and transfer task |

## Assessment Design

Assessment should combine individual and team evidence. Individual evidence can include a concept pretest, confidential preparation note, post-simulation analysis, and transfer case. Team evidence can include a bargaining plan, costing sheet, process record, tentative memorandum, approval presentation, and final agreement. Observer evidence should document behavior rather than impression.

An analytic rubric can score preparation, quantitative analysis, information use, questioning and listening, interest exploration, strategic coherence, package construction, mandate compliance, accuracy of written terms, constituency accountability, ethics, and reflection. Agreement value should not dominate the score: a favorable number obtained through unsupported assumptions, rule violations, or language ambiguity is not stronger performance than a well-reasoned impasse.

Feedback should occur at three points. Before bargaining, instructors can flag incomplete plans without revealing confidential information. During the simulation, observers can record behavior while instructors intervene only for process or safety. Afterward, feedback can compare intentions, observed behavior, outcomes, and transfer. Authentic role-play exercises are more useful when expectations, engagement, and debriefing are designed rather than assumed (Albright & Finn, 2021; Poitras et al., 2013).

## Discussion

The source simulation is best understood as a compact introductory demonstration. It successfully gives learners opposing teams, private mandates, two issues, a deadline, a tentative deal, and a constituency vote. Those components are worth preserving because

they make collective bargaining visible and invite emotional as well as analytical engagement.

Its central weakness is that a short role-play is asked to carry learning that has not been operationalized. The manuscript states broad course outcomes, but the exercise has no objective specifying what a successful learner will produce or demonstrate. A revised activity should state measurable outcomes: prepare an authorized package, use data to justify proposals, identify interests, record movement, draft unambiguous terms, explain the agreement to constituents, and evaluate process and outcome.

The redesign also shifts the unit of learning from 'getting a deal' to managing an accountable process. Negotiators represent principals, operate within authority, interpret information, maintain records, and translate economic agreement into language. Ratification or approval is not an epilogue; it shapes preparation and table behavior. The two-level structure can therefore become the simulation's organizing principle.

Finally, the laboratory should treat inclusion as more than a debrief feeling. Noncommittee roles can serve as observers, constituency caucus leaders, cost analysts, communications officers, or ratification questioners. Every learner should have access to a meaningful task and an individual evidence requirement. This improves engagement and makes large-class implementation more defensible.

## **Revision and Validation Priorities**

Development should begin with objective alignment and scenario documentation. The author should prepare a shared fact sheet, confidential role briefs, instructor guide, costing key, protocol, observer tool, model bargaining record, tentative memorandum, ratification materials, rubric, and debrief guide. A subject specialist should review labor-relations concepts, while negotiation educators should review realism, balance, incentives, and debrief design.

Piloting should examine whether the scenario produces meaningful variation without hidden impossibility. Designers should track time use, question quality, concession patterns, costing accuracy, mandate violations, agreement ambiguity, participation,

and debrief insight. Inter-rater agreement for rubric scores and learner response to confidential roles should be studied. Only after revision should a comparison study test learning against discussion, case analysis, or another simulation format.

**Table 3**

*Development and Research Sequence*

| Stage        | Development task                                                                             | Quality evidence                                   |
|--------------|----------------------------------------------------------------------------------------------|----------------------------------------------------|
| 1. Specify   | Write measurable outcomes and a complete scenario model                                      | Objective-task-assessment alignment map            |
| 2. Build     | Create shared facts, confidential briefs, costing key, protocol, forms, and instructor guide | Complete simulation package                        |
| 3. Review    | Audit labor concepts, negotiation incentives, language balance, inclusion, and accessibility | Specialist review and revision log                 |
| 4. Pilot     | Test timing, participation, calculations, mandates, agreements, and debrief                  | Observation data and learner work                  |
| 5. Calibrate | Train raters and refine analytic rubric and feedback                                         | Inter-rater agreement and scoring notes            |
| 6. Evaluate  | Compare learning and transfer with another instructional condition                           | Predefined design, outcomes, and fidelity evidence |

## Limitations

This article analyzes the written activity, not its classroom enactment. An instructor may have supplied undocumented explanations, constraints, or feedback. The study did not interview the original author, observe bargaining teams, or measure knowledge and skill. The proposed seven-phase laboratory is a design framework that requires contextual adaptation and pilot evidence; it is not a validated intervention or a substitute for current legal instruction.

## Conclusion

Labor Relations and Negotiation contains a promising collective-bargaining role-play built around union and management committees, asymmetric mandates, wage and leave trade-offs, ratification, and reflection on representation. Its compactness makes

bargaining tangible, but its current form privileges intuitive compromise over evidence-based negotiation and provides little assessable learning evidence. A seven-phase laboratory can retain the accessible core while adding doctrine, role preparation, costing, protocol, timed bargaining and caucus, written agreement and approval, structured debriefing, feedback, and transfer. With complete materials, analytic scoring, inclusive roles, specialist review, accessibility work, and field validation, the exercise can become a credible negotiation laboratory rather than a one-time classroom performance.

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