Spring 2021

How Do Teachers Make Decisions Around Union Membership And Engagement In My Middle School Setting?

Natalie Sasseville-Praska

HOW DO TEACHERS MAKE DECISIONS AROUND UNION MEMBERSHIP AND ENGAGEMENT IN MY MIDDLE SCHOOL SETTING?

by

Natalie M. Sasseville-Praska

A capstone submitted in partial fulfillment of

the requirements for the degree of Master of Arts in Teaching.

Hamline University

Saint Paul, MN

May, 2021

Primary Advisor: James Brickwedde
Secondary Advisor: Allison LaBree
Peer Advisor: Andrea Sasseville

To my family, whose constant love and support enabled me to reach the end of this journey. I think especially of my husband, Dave, who cheered me on every step of the way and took on extra responsibilities at home in order to make time for me to get this done. I also think of our parents, who spent many hours caring for our daughter so that I could complete this work, and my beloved aunties, Melanie and Rea, who graciously stepped into the editing role that previously belonged to my Dad. You, my family members, are the source of my inner strength and without you this would not have been possible. I also dedicate this work to the crew of "experts" who shared their professional insights and patiently supported me throughout the extended term of this project, including my advisor, James Brickwedde, and everyone on my Capstone committee. I appreciate your time, encouragement, and expertise. I am overcome with gratitude when I think about the hours of thoughtful attention you have so generously devoted to my work.

“You are never strong enough that you don’t need help.”
-Cesar Chavez

ACKNOWLEDGEMENTS

Special thanks to Diana Bledsoe, who allowed me to conduct research in our building and always supported me in it. Thanks to my hard working colleagues, who gave their precious time and energy in order to share their union-related beliefs and experiences in my survey. Thanks especially to the four educators who, in addition to participating in the survey, gave hours of their lives for me to interview them. Getting an in-depth window into their experiences as educators was, without question, the most fascinating part of this Capstone. Last but not least, thank you to Anna Dougherty, whose initial invitation to join the Early Career Leadership Fellows empowered me and changed the trajectory of my experience as a teacher. Her invitation led me to meet many other union leaders who in various ways helped me build this Capstone, including Kelly Wilson, Allison LaBree, Justin Killian, Stacey Pelika, Sara Gjerdrum, and John Stocks. Thank you all, for the rich educational experience, and for fueling my growing passion for teachers union activism.

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

CHAPTER 1

Introduction

Research Goals

American teachers unions have served as an important tool for amplifying educator's voices for over 150 years. Since the late 1850's, educators have come together through professional organizations like the National Education Association (NEA) and the American Federation of Teachers (AFT) to advocate for the interests of American educators (Cowen & Strunk, 2014). Over the years, teachers unions' roles have expanded beyond elevating the professional status of educators to include other types of advocacy, such as negotiating with management for better working conditions (especially by facilitating collective bargaining agreements, or CBA's), and political organizing at the local, state, and national level (Mertz, 2014). Their membership has also expanded beyond just teachers in classrooms to virtually all workers shaping today's educational ecosystems. Their members include k-12 teachers, Education Support Professionals (ESPs) and other school-related personnel, early childhood educators, higher education faculty and staff members, aspiring educators, retirees, local, state, and federal employees, nurses and other health employees, and community allies (NEA, n.d.)(AFT, n.d.). While this study will focus specifically on union membership and engagement among k-12 teachers, and specifically middle school teachers, it is important to acknowledge the vast array of educators represented by today's teachers unions.

While many educators, political leaders, and community stakeholders champion teachers unions' efforts, others are extremely critical of them. Proponents of teachers unions argue that professional educator organizing leads to improved learning conditions and stronger, more equitable student performance. Critics of teachers unions, however, argue that they act as a drain on education funding and resources that would otherwise go directly to students, and prioritize union and educator needs over students' needs (Intelligence Squared Debates, 2010). In an era of polarizing politics and increased criticism of labor unions in general, it is a divide that seems to be widening.

As a teacher with colleagues on both sides of the debate, I wondered about teachers' attitudes regarding union membership and engagement in my own context. With the June 2018 *Janus vs. American Federation of State, County, and Municipal Employees (AFSCME) Council 31* Supreme Court ruling, which ended the requirement that public employees pay a fee to unions to cover the costs of collective bargaining, I felt it was a good time to pursue the research question: *How do teachers make decisions around union membership and engagement in my middle school setting?"* The purpose of this capstone is to add more local teacher voices to the teachers union debate, and identify underlying reasons why teachers in my building may or may not be choosing to become union members and/or engage in union activities. It also seeks to uncover teachers' underlying beliefs surrounding unions and the role they play in education today. As a teacher who has been fairly active in my state and local union and values the resources unions provide, I hope to gain new insights into how my colleagues perceive and relate to teachers unions, and use my research findings to both promote growth within our state

and local union chapters and make their work more relevant to the current needs of today's students and educators.

In chapter one of my capstone, I explain how I arrived at my research question. My reflections show how I slowly evolved from an isolated new teacher, caught up in her own micro-level classroom experiences, to an active union member working with other educators to make education policy change on the macro level. This chapter also illuminates the fact that social justice and equity have always been the primary focus of my work as an educator and union member, and that student advocacy and teacher advocacy go hand in hand.

Journey

In this section, I explain parts of my background as an educator, how I came to be interested in education policy and union activism, and the context of my work and research at North View Middle School, with a brief overview of student and teacher demographics.

Reflecting on my first year

When I arrived at North View Middle School in August of 2016, it was with a personal ultimatum: I would take this position and if it turned out to be a positive and sustainable opportunity I would stay. If not, I would leave the teaching profession altogether. I had just wrapped up my first year teaching in the English Learner (EL) program in a nearby Twin Cities school district and it had proven to be the worst year of my life.

Like many educators, I had come into teaching starry-eyed and optimistic, only to find out that it was a role I was entirely unprepared for. As the only EL teacher in one of my two buildings, I had a big responsibility. I was expected to manage students' EL files, conduct language proficiency testing for all incoming students, arrange interpreters for conferences and meetings, and run the building's Equity team. In addition, I was expected to teach six half-hour sessions of pull-out EL instruction to students in kindergarten through fifth grade at one school in the morning, followed by three more sessions with students in third through fifth grade at another school in the afternoon. I had nine different preps, no established curriculum to work from, and no EL team to collaborate with for the bulk of my day. In terms of workload, student behavior, and content knowledge, I was in over my head. Tears on the way to and from school were a regular occurrence, and many times I did not know how I was going to find the strength to come back again the next day. Somehow I kept my head down and continued slogging through.

I was well aware that my job was taking a significant toll on my mental health, and before the year was even half over I had already seriously contemplated breaking my contract and leaving my position. My anxiety was skyrocketing, bringing chest pains and panic attacks that embarrassingly hit in the middle of team meetings. I had come to teaching because I was passionate about advocating for English Learners and their families, but in the process of doing my job I was losing both my passion and my health and well-being. "If this is what being a teacher is really like," I told myself, "then I don't want to be one."

Despite my district-appointed mentor's best efforts to help me stay positive and learn strategies that would make my job more bearable, I knew without a doubt when the last school bus rolled away in June that I could not put myself through another year in that role. I resigned without securing another position, unsure if I would even return to teaching. I used that summer as a time to process and reflect on my own personal goals as an educator. I came to realize that despite the terrible year I'd had, there was still hope. I was weakened and discouraged, yes, but inside of me there was still a desire to welcome immigrant students, celebrate their cultural identities, and help them learn how to be successful in American schools. It was the career I had worked hard for and dreamed of ever since my first English teaching experience in Costa Rica. After thinking long and hard about it and seeking the advice of friends, family, and my cooperating teacher from Student Teaching Seminar, I decided I would give teaching one more try.

An introduction to unionism

Even though my first year of teaching proved to be a hellacious experience, it did provide me something for which I will always be grateful: an introduction to unionism. That year my district's Education Minnesota chapter was in contract negotiations with the school board, and things were not going the way the union had hoped. Teachers were expecting pay raises, which they felt were long-overdue, but the district was only willing to offer them a 1% increase. This angered teachers across the district, and the union's negotiating team refused to accept the school board's offer. It became an even more bitter battle when the superintendent openly disparaged teachers for their opposition to the contract in front of the whole community through comments on a district webpage. In

response, union members decided to enact an industrial action called work-to-rule, where workers choose to fulfill only the minimum requirements of their contracts, staying in their buildings and completing their contract-specified duties only within their contract hours. Because so many teachers work around the clock, going above and beyond the minimum requirements of their contract hours to prepare lessons, grade work, and ensure that every student is well-served, this action highlighted teachers' value to the community, and the fact that their time is worth significantly more than what they were being paid. Every morning, teachers would walk into their buildings together at the start of their contract time, and walk out together at the end of their contract time in the afternoon. School operations slowed down and became less efficient, putting extra pressure on the district to give teachers a more sizable pay raise. That summer, the district finally put forth a proposal that the union deemed acceptable and a new teacher contract was approved.

As a new and already disillusioned employee, participating in the work-to-rule process was fascinating. I saw that, like me, the other Education Minnesota teachers advocating for these contract changes cared deeply about their students and their profession, but felt that their work was not being fairly valued. Teachers across the district were not being paid salaries commensurate with their education, experience, and abilities. In addition, new teachers, like me, were being thrown into the most undesirable and isolating teaching positions without adequate experience or support to be successful, which was bad for educators and students alike. I was starting to make connections, and

realizing that there was strength in numbers. “If teachers can facilitate changes to contracts by banding together,” I thought, “then imagine what else they can do.”

New School, New District

After that first year of teaching and foray into union activism, I started looking for teaching jobs with a whole new attitude. My plan was to apply for an EL position in a new district, but this time if I got an interview I would ask more questions and do my homework to find out exactly what kind of work environment I would be getting myself into. I would also be choosier about the position I ultimately took, and if after one year I still felt like I was drowning, I would leave teaching to pursue another field. In addition, I would join my local union so that I had a lifeline to as much support as possible.

I applied for and interviewed at several different schools during the summer of 2016. In the end, it was a Middle School in a suburb of North Minneapolis that felt like the best fit. The position mostly involved teaching 6-8th grade English Learners in co-taught math classes. Since I loved math and had experience supporting pre-algebra students in past paraprofessional and tutoring positions, it was a job that really appealed to me. I was also attracted to the position because I knew I would be working with a team of three other EL teachers, and would have access to more support if needed. I decided to accept the position and take my chances on another year in teaching.

Two days later, I was at my first day of workshop week getting to know the staff, which was composed mostly of younger teachers in their first five to ten years of instruction. There were also a handful of veterans who had been at the school or district for ten plus years. I was encouraged to find out that the teachers on my EL team were

extremely friendly and supportive, and that their classes were organized so that no individual teacher had to shoulder an unnecessarily large workload. I could tell this would be a better experience already.

When the school year started, I worked hard and sought support whenever I could. I got to know my students and fellow staff members and took advantage of almost every professional development opportunity available. Teaching was still a challenge, but I found myself improving in areas like behavior management, lesson planning, and organization. I also joined the union, and attended its meetings and social events regularly. It was there that I got to know some of my closest colleagues, and started working for Educational initiatives that I truly believed in. With these extra supports, I was finally in a school and district that felt like home.

Equity Focus

Even though my new school was a much better fit for my own personal and professional needs, I realized quickly that my new building's students and community members faced a number of challenges. Many of the students lived in poverty and had experienced major traumatic episodes in their lives. I also learned that the school had developed a reputation in the community as a "bad school," and that it had a history of low test scores and high suspension rates. This challenging school climate led to high teacher turnover almost every year, which only seemed to exacerbate its problems. Like myself, almost all of the teachers were white. In contrast, 92% of the students were students of color, with African American and recent African immigrants representing the largest racial subgroup, followed by Asian students, Latino students, and students of two

or more races (Minnesota Department of Education, 2018). With schools on the other side of the district that were over 70% white, it was impossible to overlook the fact that our district was extremely segregated.

Noticing the racial and socioeconomic inequality in our school building and district, I decided to join my building's Equity Team. This group of teachers got together monthly to reflect on the ways we could better serve and support our students as well as advocate for them in the greater community. Following the election of America's 45th president, Donald Trump, the enactment of Trump's Middle East travel ban, and an incident of hate speech against Muslims that occurred in one of our district's high schools, many of our immigrant students were feeling extremely threatened. Therefore, we talked about ways we could let our students know that they were welcome and safe in our classrooms and that they could trust us as teachers. We also talked about the inequities we saw across our district, and the fact that our students and their families did not seem to have a voice on the all-white school board. This was something we wished we had the power to change.

Early Career Leadership Fellows

During my second year teaching in my new school, I was recruited to join an Education Minnesota teacher group called Early Career Leadership Fellows (ECLF). The purpose of this group was to educate early career teachers on the various roles of teacher unions, and connect them to leadership opportunities around professional and social justice issues in their local union chapters. A central part of the ECLF experience is designing a project that addresses an issue around education in members' own school,

district, or community. Because all of the teachers in our local union's ECLF chapter worked on the less affluent/more diverse east side of the district and wanted to see our students get better representation, our group decided to focus on changing the makeup of the school board.

For many years the school board members in our district were 100% white and all lived on the west side of the district. There had been efforts to get a community member from the east side elected, but until recently no one ever made a successful bid for office. At the time that ECLF began researching this issue, a few of the current school board members who were very conservative made comments that were politically divisive. In an effort to get their voices heard, a group of parents and community members sprang up, calling for signatures on a petition to change the way school board members get elected in our district. The group's goal was to change the current school board makeup from at-large seats to regionally based seats, ensuring that community members from each geographic area of the district would get a voice at the table. If the group could successfully get 10,000 signatures, the school board would be forced to put the issue to a vote.

As ECLF members, we decided to make this initiative our project for the year. We joined the initiative's field team, which was focused specifically on organizing students and parents to promote the petition and get as many signatures from community members as possible. Some of us also participated in the messaging team, which focused on using social media to get word of the initiative out in the community. The experience not only broadened my view of what the union does, but it also showed me that through union

organizing teachers can affect education policy changes that greatly benefit the students and communities they serve.

Education MN Political Action Committee

Beyond my involvement in ECLF, I also took on the role of Education Minnesota Political Action Committee (PAC) leader for my building ahead of the Fall 2018 midterm election. The PAC's major goal was to elect a Democratic governor who would be committed to fighting for both public education and our union's right to collective bargaining. At PAC meetings, I learned about what happened in states like Wisconsin, where union member's collective bargaining rights were stripped away. I also learned about the Supreme Court case, *Janus vs. AFSCME Council 31*, which was still yet to be decided. Union leaders and educators were raising awareness about the case because they knew it would profoundly affect unions and their members. They knew that the decision, which would not come down until the summer of 2018, had the potential to greatly limit the power of public sector unions to collect a portion of union dues known as agency fees, or "fair share" fees. Mark Janus, the plaintiff, was a public employee who chose not to become a full dues-paying member of his local union, AFSCME Council 31. He brought this lawsuit against them in protest of the union's requirement to pay a fee covering the cost of union representation during collective bargaining, arguing that he should not have to pay if he did not want to be a union member. If the court were to rule in favor of Janus, then unions might lose their right to collect these "fair share" fees from non-members, which could lead to a significant drop in money generated by unions and greatly strain the resources and services unions provide (Totenberg, 2018).

This experience made me realize that our unions were in danger of losing their power, which could potentially lead to negative outcomes for both teachers and students. As a PAC leader, I encouraged all teachers in my building to vote in the upcoming election and advocate for their right to organize. I planned and facilitated events for staff focused on promoting early voting in the upcoming midterm election, and focused specifically on reaching out to the teachers who had chosen not to vote in the past. While it is hard to know exactly what impact my work had on election outcomes, I like to think that my efforts as a building PAC leader had some influence in the election of our current governor, former teacher Tim Walz, in November of 2018.

Concluding thoughts

My journey as an educator and union member has taught me that on my own, my ability to advocate for my students is powerful, but there is even greater power in numbers. Unions not only help teachers fight for fairer wages and working conditions, but also amplify their voices in ways that make them social justice advocates for their students and communities. Based on these facts, I believe that it is in the best interest of both teachers and students to protect teachers' rights to organize. In addition, I believe it is in the best interest of teachers to recruit and educate their colleagues on the value of unions. With the recent Supreme Court ruling in favor of Janus in June of 2018, which made it illegal for public sector unions to collect agency fees, and now an unprecedented surge of changes to k-12 education brought by the COVID-19 pandemic, this goal is now more important than ever.

For these reasons, I have decided to pursue the research question: *How do teachers make decisions around union membership and engagement in my middle school setting?"* I will seek answers to this question by surveying teachers in my building and gathering their thoughts, experiences, and opinions through semi-structured interviews. I hope that my results will lead to new understandings of how educators perceive, understand, and engage with unions.

Chapter two involves a brief history of American teacher unions, followed by a discussion of the arguments for and against teacher unions and the current political climate surrounding them. Chapter two will also include a summary of the research on teachers' beliefs, attitudes, and perceptions regarding teachers unions and the unique state of the teachers unions in Minnesota. Chapter three then goes on to discuss the research methodology used to gather data from teacher's in my building about their union membership, engagement, and beliefs. Chapter four will discuss the results and implications of my research.

CHAPTER TWO

Literature Review

Chapter Overview

This chapter will review the literature about teacher unions' past, present, and future, in order to set the scene for new research into union membership and engagement in my middle school setting. The chapter begins with a brief summary of the history of teachers unions in the United States, followed by a discussion of the debate surrounding U.S. teachers unions today. This second section also highlights the major arguments for and against teachers unions, and touches on the current education reform efforts championed by union members. The final section of this chapter looks at several issues likely to affect U.S. teachers unions into the future, including demographic shifts, charter schools, post-recession hiring, Supreme Court cases, and the research around teachers' membership and engagement with unions, as well as their beliefs and perceptions about them. This research includes studies of active vs. inactive union members, novice teachers vs. veteran teachers, and millennial teachers vs. non-millennial teachers. The final study explored in this section, which was released in 2018, just before the Supreme Court handed down its decision in the case of *Janus vs. AFSCME Council 31,* examines the decisions teachers would likely make about union membership and engagement in a Post-*Janus* world. Understanding these studies in light of the history and current issues surrounding teachers unions illuminates the considerations that should be taken up in

future research, and sets up the research question: *How do teachers make decisions around union membership and engagement in my middle school setting?"*

A Brief History of National Teacher Unions

NEA Origins

Teachers unions as we know them first came on the national scene in 1857, when the organization that would later become the National Education Association (NEA) started as a group meant to advance the professional status of teachers, administrators, and university professionals. Members of this early association sought to gain more public respect for their professions, and worked on issues such as improving salaries, making the requirements for licensure more uniform and rigorous, and amplifying educator voices when it came to working conditions (Mertz, n.d.). It should be noted that at this point in time, the NEA did not yet consider itself a "union," but rather an "association." It was focused more on professionalizing the education industry than on advocating for members on "bread and butter" issues of salaries and working conditions, which are traditionally associated with teachers unions today. The early leaders of the NEA believed that the most effective way to change the landscape of the education system was to change policy, and thus focused most of their energies on affecting legislative decisions at the state and national level (Yusim, 2008). The teaching workforce around the turn of the century was composed mostly of women, while the administrative workforce was composed mostly of men. The administrators had authority over the teachers, which limited teacher power and voice in the association (Yusim, 2008).

Because the NEA's membership at this time included professionals from all corners of the education world, it was charged with representing a vast spectrum of educator interests. Its membership was initially divided into four major departments, including school preparation programs, school superintendents, colleges, and elementary schools. Secondary school teachers and administrators were originally included with other members of the higher education system, but they eventually got their own department within the NEA in 1887. It was those in higher education who typically held leadership positions in the NEA (Urban, 2007), which meant that the mostly female workforce of elementary school teachers had less influence in the association.

Women Lead the Way

Despite their limited influence, female elementary school teachers banded together and found ways to voice their concerns. They were known to flood association meetings, which were held in a town hall format, where every member could speak and vote. Attending together in high numbers allowed them to outnumber and outvote NEA leaders on business items in contention. This practice contributed to teacher influence, but not without ruffling many feathers. In response, NEA leaders sought to reorganize meeting and voting procedures by creating the Representative Assembly, or the RA (Urban, 2007). This voting system elected delegates to a national meeting by region, which meant that all members no longer had the power to vote or speak. Unsurprisingly, delegates at the first NEA representative assemblies were overwhelmingly male administrators. This angered many teachers, who wanted more equal representation at the assembly, and further contributed to a deep rift between teachers and administrators in the

NEA. It was against this backdrop that the female-dominated teacher workforce would rise up and demand to have their own voices heard (Yusim, 2008).

Long-time elementary teacher and activist, Margaret Haley, was one of the most influential female voices in the early NEA. She vocally advocated for NEA leaders to redistribute power and make the association more democratic. She was also instrumental in electing the first female NEA president, Ella Flagg Young, in 1910, and established a department of classroom teachers in the NEA in 1912. She, along with many other female teachers, was responsible for organizing elementary teachers to flood meetings and assert their influence over administrators (Urban, 2007). Haley and fellow teacher, Catharine Goggin, also formed the Chicago Teachers Federation (CTF), in 1897 (Mertz, n.d.). This move paved the way to uniting teachers with other leaders in the labor movement.

AFT Origins

As founders of the CTF, Haley and Goggin hoped to create an association of teachers focused on "...Protecting pensions, improving salaries, gaining tenure protection, and democratizing the administration of the Chicago Public Schools," (Yusim, 2008). They also famously sued local businesses who failed to pay their share of property taxes, money that would have gone to the operation of local schools, and fought to change child labor laws and teacher pensions (Yusim, 2008). In addition, they created a sounding board for many urban teachers who were not entirely happy with the NEA's tactics and wanted to instead align themselves with the labor unions (Mertz, n.d.).

When the CTF gained national attention for their activism, other urban teachers around the country decided to follow suit and begin new local organizations with similar

goals. In 1902, the CTF decided to unite their organization with the Chicago Federation of Labor (CFL). The CFL was Chicago's city affiliate of the national labor organization, American Federation of Labor (AFL). Local organizations continued to organize and in 1916, the CTF and several other locals came together to form the American Federation of Teachers, or the AFT (Mertz, n.d.).

Different Approaches

From that point on, the NEA and the AFT both worked on behalf of educators, but with very different goals and approaches. While the NEA continued to identify itself as a professional organization of teachers and administrators focused on changing education policy and gaining national respect for education professionals, the AFT identified itself as a teacher's labor union. According to historian John F. Lyons, the AFT at this time "...Remained a loose federation of a few strong urban locals," (Lyons, 2007). It was more interested in affecting grassroots change for local teachers than it was in affecting education policy at a higher level, and focused on improving salaries, benefits, and working conditions for its teachers. In addition, the AFT focused on ending discrimination against female teachers, and sought to change the language of teacher contracts that strictly controlled female teachers' dress and social conduct (Mader, 2012). It continued to align itself with the AFL, and intentionally barred administrators from becoming members (Mertz, n.d.). These very different approaches to educational advocacy naturally led to very different reactions from the public.

During World War I and the years directly following, there was great public opposition to unions in the public sector. Though the public was skeptical of organizing

in general, the NEA had a far easier time than the AFT. The NEA spoke out against unions, saying they were "unprofessional," and was able to gain new members. For the AFT, however, it was a different story. Many state and local governments banned public sector unions, including teachers' unions (Mertz, n.d.). In addition, many school boards put pressure on teachers to resign from their unions, and the AFT lost much of its membership. Though significantly weakened, it continued to organize and work for the wellbeing of teachers through its remaining locals (AFT, n.d.). As the national rhetoric around education continued to shift, leaders of the two organizations rallied around different causes, both in the name of educational progress.

The NEA and the AFT continued to hold very different approaches to educational advocacy throughout the Great Depression, World War II and the Cold War era. When the Depression spurred drastic cuts to education spending, the NEA lobbied for increasing national investment in America's classrooms, arguing that it would pay off for the country as a whole. The AFT, on the other hand, responded by organizing its teachers more militantly (Mertz, n.d.). Following passage of the 1935 Wagner Act, which gave private sector unions the right to collective bargaining and led to a national union boom (National Labor Relations Board, n.d.), the AFT worked to bring similar progress to the public sector. It regained many members and mobilized a force of dedicated teacher activists, many of whom were willing to defy the AFT's wishes and strike in the name of increased teacher pay and equal pay scales for men and women (Mertz, n.d.). Unfortunately, the AFT's militant organizing and rhetoric got some of its locals into trouble in the years surrounding WWII. A few AFT locals found themselves at the center

of allegations claiming they were propagating communist ideas, and were shut down by an executive AFT board following investigations (AFT, n.d.). In the wake of these dramatic developments, the NEA avoided national controversy by continuing to focus on educator professionalism and separating itself from the activism of the national labor movement (Mertz, n.d.). Though the AFT and the NEA were both fighting for the betterment of educators, they could not have appeared more different.

Meanwhile, both organizations championed civil rights in their own unique ways. The NEA partnered with 18 different African American teacher organizations where black teachers had been forbidden from joining with white teachers. Black teachers in the American Teachers Association (ATA), who would later merge with the NEA in 1966, provided the single greatest African American source of funding for the 1954 Brown vs. Board of Education legal defense fund. It was instrumental in making the landmark decision that ended school segregation a reality. The NEA responded to the Brown decision at its 1954 Representative Assembly, calling for all Americans to "...Approach integration in a spirit of goodwill and fair play" (NEA, n.d.). The AFT also contributed to the 1954 decision by filing an Amicus Curiae brief and ousting locals that failed to desegregate (AFT, n.d.). While the organizations remained separated by years of somewhat conflicting missions, they were beginning to come together on specific issues.

Collective Bargaining

During the revolutionary 1960's and 70's, both the NEA and the AFT experienced many changes. When the AFL and the Congress of Industrial Organizations (CIO) merged to form what is now known as the AFL-CIO, there was a great push for public

sector unions to win the right to collective bargaining. It was a cause that many Civil Rights leaders, including Dr. Martin Luther King Jr., helped champion. Wisconsin was the first state to adopt collective bargaining laws for its public employees (Mertz, n.d.). This decision was followed by President John F. Kennedy's executive order 10988, which led to federal employees also gaining the right to collective bargaining (Yusim, 2008). As the collective bargaining trend caught on, twenty-two other states followed Wisconsin's lead. Despite activists' best efforts, however, collective bargaining laws varied significantly from state to state, and the new laws failed to secure all of the freedoms unions had been pushing for. The federal law and many state laws, for example, forbade public workers from striking. In addition some states, especially southern states, continued to deny their workers collective bargaining rights even after they had been adopted by so many other states throughout the country (Mertz, n.d.). Though these new collective bargaining laws had their limitations, they were clear signs of progress for unions.

While members of the AFT played a major role in this nationwide initiative, the NEA faced a new dilemma. Collective bargaining meant that teachers and administrators, longtime colleagues in the NEA, would play on separate teams when it came to important decisions regarding teacher contracts, salaries, and school policies. NEA teachers and administrators wondered how they could continue to work together in the association, and worried that their conflicting interests would get in the way. These concerns grew, ultimately leading to the NEA's 1975 decision to expel administrators and allow only teachers to become members (Yusim, 2008).

After merging with the ATA in 1966 and taking a more active role in organizing within urban districts facing racial tensions, the NEA decided to change its constitution to become more union-like. It continued its push to advocate for teachers and students of color on civil rights issues, as well its longtime practice of lobbying at the state and federal level for improved education policies. It also banded together with other public unions to advocate for public workers' rights, and even led strikes (Mertz, n.d.). It had finally evolved into a real union.

Now with similar missions and strategies, the NEA and the AFT were becoming more and more alike. Both organizations saw their membership climb as teachers increasingly demonstrated by striking and using their newfound collective bargaining powers to achieve their goals (Lyons, 2007). With considerably more power and influence, the AFT moved its national headquarters to Washington D.C. so that it could play a more active role in lobbying at the federal level, and both unions began making political candidate endorsements (Mertz, n.d.). More than once the NEA and the AFT discussed a possible merger at the national level, but never succeeded in securing enough overall support to proceed with such a decision. They instead formed a joint partnership focused on collaboration between the two unions, and have been working together since 2000, (Leroux, 2007).

While the AFT and NEA have not yet joined forces at the national level, a handful of AFT and NEA affiliates have successfully merged at the state and local levels. At the state level, Minnesota was the first to merge its AFT and NEA affiliates (Education MN, 2016). North Dakota, Montana, New York, and Florida later followed suit, merging their

AFT and NEA affiliates at the state level. Cities where AFT and NEA locals have come together include Los Angeles, CA, Austin, TX, and Wichita, KS. Now, with a growing list of merged affiliates and a very different set of political circumstances, many wonder if another attempt to merge the AFT and the NEA into one national teachers union could be down the road (Antonucci, 2020).

Though they have evolved to become more and more alike over the years, the complex histories of the NEA and the AFT and the ways they have fought to find their unique identities in the landscape of American education still play an important role in teacher union participation today. Deeply aware of the challenges union members have faced over the years, many veteran teachers understand their unions' differently than newer generations of teachers entering the profession. Demographic changes to the teacher workforce, coupled with a changing economic and political climate, have led to shifts in the ecosystem of teacher unions. Understanding these shifts is critical in order to answer the research question *How do teachers make decisions around union membership and engagement in my middle school setting?"*

Unions Today: Politics, Debate, and Reform

The Current Political Environment

While teachers unions have advanced significantly in the past century, the last thirty years have seen a dramatic increase in hostility toward public sector unions in general. Greatest hostility came just in the last ten years, in the wake of the Great Recession, when many public employees bore the brunt of budget cuts made by state

governments facing deficits. In many cases, state governments facilitated these cuts by passing legislation aimed at putting a damper on public sector unions (Baron, 2018).

One of the most salient examples of this kind of legislation came in 2011, when Wisconsin (which, ironically, was the first state to win collective bargaining rights for its public employees) made union history again for a different reason. This time, newly elected governor, Scott Walker, enacted a new law called Act 10, which sought to lower budget deficits by significantly limiting the powers of public sector unions. The new law put an end to collective bargaining for almost all public workers, including teachers, and eliminated many freedoms around contract negotiations. It also included several other provisions meant to make union membership more difficult. For example, Act 10 forced public unions in Wisconsin to end automatic dues collection and required members to rejoin the union again every year (Swalwell, Schweber, Sinclair, Gallagher, & Schirmer, 2017, p. 487). In a shrewd political move, the Walker administration exempted police, state troopers, and firefighters from the law's new changes to collective bargaining. Thus the law's strongest union restrictions were directed squarely at teachers (Strauss, 2018).

In the months immediately following the passage of Act 10, it was clear that teachers and other public employees were feeling the pain of their unions' new limitations, but with only short-term data and anecdotal evidence, the full extent of the damage was difficult to quantify. Now, nine years after the law's passage, the data reveal several negative consequences for teachers. A 2017 study from the Center for American Progress showed that in the years following Act 10, median teacher salaries and benefits fell. Teachers left the profession at higher rates than before the law was passed,

contributing to a growing teacher shortage in Wisconsin and lowering the average years of teaching experience among Wisconsin educators. In addition, teacher turnover rates increased, with more and more teachers leaving one district at the end of the school year to teach in another the next (Madland & Rowell, 2017). This report shows that the law's restrictions on Wisconsin's teachers unions and negative outcomes for public educators were clearly connected, but another question remains: How did the passage of Act 10 affect student outcomes?

Authors David Madland and Alex Rowell of the Center for American Progress (2017) make clear in their report that it is difficult to draw solid conclusions about the effects of Act 10 on student achievement in Wisconsin. Because of the dearth of existing data on this topic, more research on the effects of Act 10 on student achievement is clearly needed. While this issue needs more examination, the question of whether or not unions are good for students is a subject that is widely studied and hotly debated. Because the work of teachers unions is so multifaceted and differs widely from state to state and district to district, it is a complicated question to answer. The following is a discussion of the arguments for and against teachers unions from the perspective of an unapologetically pro-union (but also pro-union reform) teacher:

Arguments Against Teachers Unions

It seems that teachers across the country find themselves in an ever-intensifying struggle to have their voices heard and their rights to advocate for their students and professions respected. "I argue that the public, through media reports going back to the Reagan years, has been systematically taught to fear public education and to denigrate

public school teachers' dedication, intellectual capability, and civic concern," said editor Pamela K. Smith in her introduction to the 48th volume of the journal *Educational Studies* in 2012. This growing hostility to teachers and their unions comes against a backdrop of mounting pressure on schools to close the achievement gap and stem the tide of falling student achievement. In his 2013 article, scholar William C. Smith argues that the media and other union critics have skillfully undermined teachers unions in recent years by deploying three key arguments. These arguments are highlighted below:

Argument 1: Teachers unions halt reform efforts. Many critics of teachers unions believe that the unions themselves are standing in the way of education reform. According to Smith (2013), teachers union opponents have identified several practices in public education that they believe ought to be changed if public schools are to truly serve their students' best interests. Most of these practices revolve around teacher tenure, salaries, accountability, and evaluation (Smith, 2013). Perhaps the most common criticism heard from teachers union opponents is that unions protect bad teachers and work to preserve systems that prioritize teacher seniority over teacher quality (NPR News, 2010). In a 2010 Intelligence Squared Debate on the motion: "Don't blame teachers unions for America's failing schools," Hoover Institute Political Science Professor, Terry Moe, said:

> "The teachers unions have fought for all sorts of protections in labor contracts and in state laws that make it virtually impossible to get bad teachers out of the classroom. On average, it takes two years, $200,000, and 15% of the principal's total time to get one bad teacher out of the

> classroom. As a result, principals don't even try. They give 99% of teachers -- no joke -- satisfactory evaluations. The bad teachers just stay in the classroom."

Moe went on to contend that while teachers unions themselves might claim to be reformers, their actions do not show sufficient change to the current flawed systems to count as reform (Intelligence Squared Debates, 2010). Thus, Moe, among many other teachers union opponents, argues that unions have significant work to do in order to prove that they are making the changes needed to reform education for students.

Argument 2: Teachers unions have their members' best interests at heart, not students'. A second major argument against teachers unions is that unions do not really work for students, but for their members. According to Smith (2013), union opponents point to several educational challenges, such as teacher strikes, negative student outcomes, and excessive spending on teacher and union leader salaries as evidence that students are not really the unions' main priority. Smith highlights a 1996 study by Hoxby that compared student dropout rates between unionized and non-unionized school districts. Findings showed that the dropout rate in the unionized district was higher, adding fuel to the argument that students suffer more negative outcomes and are not given the priority they deserve in unionized districts (Smith, 2013)(Hoxby, 1996). Union critics are also quick to decry union members' decisions to temporarily leave their classrooms and stand up for their rights via picket lines as evidence that teachers put their own wellbeing before students'. Arguing alongside Terry Moe in the same 2010 Intelligence Squared Debate, former Houston Schools Superintendent and U.S. Education

Director, Rod Paige, cited a 2000 teacher strike in Buffalo, NY, that was declared at 7:00 AM, after students were already on buses to school, as proof of these skewed priorities, asking: “Does that sound like an organization that cares about kids? They were arguing for employee rights,” (Intelligence Squared Debates, 2010). Such arguments have thus garnered contempt and distrust of teachers unions among citizens.

Argument 3: Unions increase education costs for taxpayers. A third argument against teachers unions is that they drive up education costs in school districts, forcing taxpayers to spend more. Teacher salaries in unionized districts are higher, and also tend to have lower class sizes, which means greater overall spending than in non-unionized districts. In addition, many union opponents disagree with the way teachers unions manage funds, making the services unionized teachers deliver less efficient in their eyes (Smith, 2013). For example, one fiscal practice many union opponents disagree with is what is known as “release time.” Common in New Jersey and several other states, release time is an arrangement set forth in collective bargaining agreements that allows public school teachers to take a year or more away from their classroom jobs to work full-time for their local unions doing things like lobbying, recruiting, negotiating contracts, and organizing events. Meanwhile, these teachers on release time continue to receive pay and benefits from the school district. It’s a practice many concerned taxpayers and politicians want to end: “Not only does this amount to paying the government to lobby itself, but many of these private activities, such as negotiating new contracts and filing employment grievances, are directly contrary to the interests of the employer,” says Riches (2018).

Such practices have led a growing number of citizens to question whether there should be more limits to teacher unions' powers.

The influence factor. It is no secret that the nation's top teachers unions have grown into large, powerful entities with significant influence. Year after year, the NEA and the AFT make the list of top political contributors, with 94% of all teachers union contributions since 1990 going to democrats. As a group, teachers' union contributions to political groups and candidates have gone up significantly in the last decade. During the 2020 election cycle, the NEA and AFT contributed a combined total of over 50 million dollars toward democrats and liberal groups, with the NEA at number 44 and the AFT at number 26 on the list of 21,709 organizations contributing to political campaigns tracked by the Center for Responsive Politics[1] (Center for Responsive Politics, n.d.). Besides campaign spending, the two major teachers unions also spend millions of dollars on lobbying and policy research (Antonucci, 2010). The exorbitant amounts of money teachers unions spend to leverage their influence has many union critics worried they are becoming too large, too powerful, and too polarizing. "They can call on their political partners when they get in trouble...These are mammoth organizations...Teachers' unions literally have our schools in a chokehold," said Rod Paige (Intelligence Squared Debates, 2010).

[1] According to the Center for Responsive Politics (n.d.), the organizations in this ranking were "...All of the profiled organizations whose PAC or employees and their families made contributions to candidates, party committees, other PACs, outside spending groups, or 527's in the current cycle."

Arguments for teachers unions

Those who disagree with teachers unions' political activism may see their influence as a chokehold, but others see this financial leverage as a needed form of advocacy. Indeed, there are some areas where teachers unions could use reform, union proponents argue, but they still fulfill an essential purpose. Much has changed since the early days of American education, but many of the challenges teachers and students faced then are still relevant now. Unions were put in place to combat these issues and give teachers a voice, both for themselves and for their students, Diane Ravitch reminds readers in a piece for the AFT's publication, *The American Educator* (2006). The following are just a few of the reasons why educators, policy makers, and citizens continue to support teachers unions:

Unions increase teacher pay and attract quality teachers. While teachers union opponents view the unions' influence on district spending as a negative factor in education, union supporters see the situation differently. Teacher pay in many states across the country is inexcusably low, they argue, and increasing teacher compensation is necessary to recruit and retain high quality teachers (Intelligence Squared Debates, 2010). Research shows that teacher compensation is higher in districts with strong unions, especially unions with collective bargaining (Cowen, 2009). Pressuring decision makers at the state and local levels to pay their teachers a fair and decent salary and show their commitment to supporting quality educators is therefore a major priority of teachers unions across the country.

There is a significant discrepancy in teacher pay relative to other professions requiring similar levels of education. A report out from the Economic Policy Center finds that in 2015, teachers earned 11.5% less than workers with similar levels of education and experience (2016). "These are really huge pay gaps," said Sylvia Allegretto, a labor economist who helped write the report, "...And over a career, it means these workers are out tens and maybe hundreds of thousands of dollars," (Turner, 2018). According to Nínive Calegari, a former teacher, California Teacher Association (CTA) union member, co-writer/producer of the film *American Teacher,* and president of the Teacher Salary Project, there are serious consequences to this problem of underpaying teachers:

> When we undervalue a profession, we also tell the next generation of bright educators they shouldn't bother teaching—or that if they do, they must take a vow of poverty. And students pay a price: Teachers who spend nights and weekends working other jobs cannot possibly devote the necessary attention to their students or lesson plans. (Strauss, 2014).

Calegari goes into further detail on the price students pay for low teacher salaries and the ways that unions are helping combat this problem in a 2011 interview with *California Educator,* the CTA's monthly publication. She explains that underpaying teachers exacerbates the problem of teacher turnover, and helps perpetuate a vicious cycle of negative academic culture,especially in low-income schools where the most inexperienced and under-resourced teachers are likely to be employed: "It takes a couple of years for new teachers to hone their craft, so if you are constantly putting brand-new teachers in front of kids, it has a negative impact," she said. Calegari also applauds

teachers unions for leading the way in attacking this problem, saying: “I have seen lots of positive leadership in teachers unions when it comes to exploring recipes for how we can pay teachers more” (Posnick-Goodwin, 2011).

Indeed, union members have made increasing teachers’ pay a major rallying cry. Walkouts and demonstrations by union members in various US cities and states over the past few years are a major testament to this fact. In 2018 and 2019 there were state-wide teacher walkouts in West Virginia, Oklahoma, Kentucky, Arizona, and North Carolina, as well as strikes in major US cities, including Los Angeles, Denver, Chicago, and Richmond. In fighting for both increased teacher pay and better teaching and learning conditions, (i.e. smaller class sizes, more school counselors, changes to teacher evaluation systems, new textbooks, etc.) this unprecedented surge of recent teacher strikes shows that teachers unions are not only embracing a more activist-centered approach to advocating for themselves, but also advocating for their students (Wong, 2019).

Unions advocate for education reform. These recent teacher demonstrations and calls for legislative action are proof that teachers unions are alive and well and continuing to evolve in a changing world. In the past thirty years, teachers unions have been part of a great shift toward what scholars call “new unionism.” Since the 1980’s, they have changed from organizations focused mostly on collective bargaining and “industrial unionism,” or organizing around issues mostly related to salaries and working conditions, to organizations with a more collaborative focus. The goal within this new framework is to engage with multiple partners in a joint effort to reform education for both teachers and

learners. Despite this new focus, there is still widespread public antipathy for teacher unions, which can make collaboration difficult. The conservative rhetoric of the 1980's and 90's left a prevailing attitude among critics that union interests stand in direct opposition to student interests, and that they are stubborn, outdated organizations that do little to advance the public good and instead stand in the way of needed education reforms. This has created a very challenging climate for teachers and their unions, say National Education Association Center for Great Public Schools researchers Nina Bascia and Pamela Osmond (2012). "The media has framed school reform as a process that must occur outside the realm of teachers and unions, suggesting that they cannot be trusted to do what is just and right," they argue.

Despite this negative prevailing attitude toward teacher unions, members of the AFT, the NEA, and local unions across the country have actually been leading the charge on reform efforts for years. Richard D. Kahlenberg, a senior fellow at The Century Foundation, is a scholar who has documented union reform efforts in his biography of Albert Shanker, one of the late great AFT presidents. He argues that Shanker embodied a strong spirit of reform that lives on in many of its new leaders. According to Kahlenberg, current AFT president, Randi Weingarten, has, like Shanker, proposed innovative new ideas and disrupted the union status quo in ways that have surprised and impressed her critics across the aisle (2017). She has been especially active in leading reform efforts around teacher evaluation and tenure, and has helped create a new evaluation system that promotes continuous growth in teachers and ensures that they are given fair and due process. In addition, she has been extremely active in implementing new systems to make

teacher qualification a more rigorous process (AFT, n.d.). These examples show that union leaders are willing to collaborate with critics and welcome reform rather than oppose it.

Shanker and Weingarten are excellent examples of leaders who have worked to reform unions and education from the inside out. Union reform goes beyond just leaders of national organizations, however. In an effort to transform their own educational contexts, local unions across the country have been instrumental in working with districts to provide new opportunities for teachers like professional development and mentorship programs. They have also been active in leading efforts to provide technical support for new initiatives at both the state and district levels, and sponsoring projects aimed at building equity, promoting public education through the media, and researching effective educational practices (Bascia & Osmond, 2012). These independent and collaborative reform efforts now encompass a major part of both the AFT and the NEA's missions (AFT, n.d.)(NEA, n.d.).

Despite deep-seated differences between the NEA and the AFT, members of these two organizations have come together to form the Teacher Union Reform Network, or TURN. According to Precious Crabtree, an active member of TURN, its members "Work collaboratively and learn from one another in order to improve the teaching profession and serve as thought leaders regarding U.S. education" (Crabtree, 2016). One of TURN's specific goals is to bring together the very different perspectives and strategies traditionally espoused by the AFT and NEA, and re-conceptualize them under one umbrella. Through this process of collaboration, TURN has adopted a conceptual

framework developed by the Mooney Institute for Teacher Union Leadership entitled: "Constructing 'Progressive Unionism' Out of Three Frames" (See Appendix A). It establishes a three-part vision of teacher union work that combines the ideas of "industrial unionism," originally adopted by the AFT, with the "professional unionism" ideas originally adopted by the NEA. It also adds on a "social justice unionism" lens, which captures many of the ideas of "new unionism," and focuses on promoting equity within the greater community (Mooney Institute for Teacher and Union Leadership, 2005). Teacher leaders within the AFT and the NEA have thus created a joint vision of union reform that has led to real changes in the nation's schools.

The AFT and the NEA are proud of the work they do to reform American education, even when their voices are often drowned out by those that seek to blame teachers and their unions for America's education failures. At the same time, union leaders readily acknowledge that they are active players in the education landscape who make mistakes and thus bear part of the responsibility for problems within the system. Unlike many vocal union critics, however, they espouse a view of education that does not pit teachers' interests against students', but rather aligns them. In a 2010 Intelligence Squared debate, Randi Weingarten said:

> "...What our union does proudly is have a mantra. What is good for kids and what is fair for teachers. Now, am I saying that everything we've ever done is the right thing? Absolutely not. Am I saying that we are perfect? Absolutely not. But what we are trying to do in this very, very turbulent time is search for what works. Search for what works for kids."

The commitment to students heard in Weingarten's words is one that is shared across the country by educators who view their jobs as both a profession and a calling.

Unions improve working conditions and provide protection for teachers and students. Part of a teacher's calling is to advocate for her students, and sometimes that means fighting back against decisions that are likely to threaten learning. Through contract negotiations, unions advocate for better working conditions, which benefit both teachers and students, in areas such as class sizes, professional development, facilities, curriculum, instruction, and student placement, just to name a few. They also fight for provisions in areas that directly benefit teachers but indirectly benefit students, such as work schedules, teacher evaluation, layoffs, teacher prep time, leave, due process, and grievance procedures (The Education Policy Center at Michigan State University, 2014)(Noonan, 2016). Because teachers are sometimes purposely excluded from decision making processes by leaders who are not sufficiently knowledgeable about students' needs or best practices in education, the unions play a critical role in speaking and working on teachers' and students' behalf (Bascia & Osmond, 2012).

Education professor and historian, Diane Ravitch, gives a prime example of this kind of union advocacy in her piece, *Why Teacher Unions are Good for Teachers--and the Public,* which appeared in the winter 2006-2007 issue of *American Educator.* She writes about a time in the New York City school district when the mayor and his chancellor, both of whom were wholly inexperienced with delivering public education, mandated that all teachers in the city strictly adhere to a new set of reading and math curriculum, as well as teach using one specific pedagogical style. These new,

"one-size-fits-all" requirements were closely monitored and teachers were punished if they did not carefully follow them. During this period, teachers often approached Ravitch, asking what they should do if they felt their supervisors were requiring them to teach in ways they considered wrong. She said they were lucky to have representation from their local union, and many teachers brought their concerns to the United Federation of Teachers (UFT). In its 2005 contract negotiations, the UFT was able to add language that protected teachers from unreasonable administrator punishments. In cases like these, she contends, unions provide essential "checks and balances" to the education system: "We need independent teachers unions to assure that teachers' rights are protected, to sound the alarm against unwise policies, and to advocate on behalf of sound education policies, especially when administrators are non-educators," she said (Ravitch, 2006).

The highest achieving states are also the most unionized. Examples like the one above highlight the fact that today's teachers unions are just as committed to protecting effective teaching as they are to protecting effective teachers, and it appears to be working well for states like Maryland, Massachusetts, and New York. These states are among both the highest achieving and the most unionized. Research investigating the precise relationship between unions and student achievement has yielded complicated and indefinite results. In some cases, studies around this relationship have found evidence suggesting that unions encourage student performance, and other studies have found evidence suggesting that unions hinder student performance (Barnum, 2019). The fact remains, however, that unions are strong in many of the states where students are thriving. It is also important to note that many of the lowest achieving states have weaker

unions. In an Intelligence Squared Debate around the statement: “Don’t blame teachers unions for our failing schools,” AFT President, Randi Weingarten, said:

> If teachers unions were to be blamed for failing schools, then we would assume that schools in less unionized states would outperform schools in more densely unionized states. So you'd assume that places like Mississippi, Alabama, Louisiana, who have relatively few unionized teachers would do much, much better. But that's not the case. (Intelligence Squared Debates, 2010).

If anything can be concluded from this evidence, it’s that teachers unions in the United States are not hindering student performance, as many union critics contend.

Ties to the research question

The teachers union debate has led to deep divisions between union supporters and union critics. It has also led to new and innovative changes affecting how teachers unions operate. While earlier teachers unions clung to the industrial view of unionism as their main path to success, many leaders of today’s unions argue that they need to embrace reform and expand their missions beyond just the industrial role, mixing in a focus on teacher professionalism as well as a focus on social justice issues affecting students and education. These competing and changing views of teachers unions’ and their purpose play a significant role in teachers’ beliefs, perceptions, and behaviors toward teachers unions. It is important for future union leaders, therefore, to gain an understanding of the many arguments around teachers unions in order to answer the question “*How do teachers make decisions around union membership and engagement in my middle school setting?”*

The Future of Teachers Unions

While this literature review has focused considerable time and attention on the critically important work of teachers unions over the past one hundred plus years, this capstone thesis is really about the work of teachers unions now and into the future. Nationwide, membership in labor unions has been on a long-term decline (Ingraham, 2018). Recent reports from the Bureau of Labor Statistics show that private sector unions have declined the most rapidly, while public sector union membership, including teachers unions, has declined more gradually (Antonucci, 2020). Looking specifically at trends in teachers union membership prior to 2020 and the societal factors at play give some clues as to why teachers union membership has been on the decline and how it may change in the future. In 2015, Toppo & Overberg argued that three factors were coming together that would likely continue to affect shifts in teachers union membership: losses in union membership due to baby boomers retiring, the rise of charter schools and voucher programs (which tend to hire non-union teachers), and an uptick in hiring after the Great Recession. While boomer retirement and the rise of charter schools would likely promote losses in union membership, they argued, increases in hiring could perhaps work to reverse this trend.

It is also important to consider the negative effects teachers unions have suffered due to shortages of qualified teachers in certain content areas and issues with teacher retention. According to a 2016 report by the Learning Policy Institute, declining enrollments in teacher preparation programs, increasing teacher attrition rates, increases in student enrollment, and district resistance to lowering pupil-teacher ratios have all

been working to limit the supply of qualified public school teachers entering the workforce. This is especially significant in states like Minnesota, where a 2018 report showed that about 15% of new teachers are leaving after their first year on the job, and more than 25% of teachers are leaving after three years (Dupuy, 2018). Such shortages make it increasingly difficult for teachers unions to recruit and retain new members.

The Janus case

Public sector union power took another major hit in 2018, when the United States Supreme Court handed down their ruling in favor of the plaintiff in the case of *Janus vs. American Federation of State, County, and Municipal Employees (AFSCME) Council 31*. This case revolved around a major feature of union contracts called agency fees, also known as "fair share" fees. Agency fees are fees that all employees of a public institution who are covered by a union-negotiated contract are required to pay, regardless of their membership in the union. Agency fees pay for the cost of union leaders to represent employees during contract negotiations. Because a local union represents *all* employees within the bargaining unit, *all* employees within the unit benefit from the union's support, whether or not they are actually full dues-paying members. Thus, all employees pay their "fair share"(Koppich, 12).

To give a more detailed example of how agency fees work in context, consider this scenario: Eduardo recently got his teaching license and was hired to teach high school chemistry in District X. He is excited to start working in a district known for having a great teacher contract, where teacher pay is the highest of all the districts in the surrounding area. In fact, the district recently settled its contract negotiations with the

union and teachers won a 3% salary increase. After hearing a presentation about joining the union from some of his coworkers, Eduardo decides he will not join and save his money instead. Because he is a non-union member, he does not have to pay full union dues, but he does have to pay agency fees to the union to cover the cost of representing him during contract negotiations. He may not be a union member, but he did benefit from the union's hard work negotiating his teacher contract, so he and all employees must pay for their share of the union's representation.

The Janus case centered around Mark Janus, a Child Protective Services employee in Illinois, who wanted to opt out of paying agency fees, arguing that they unconstitutionally forced public employees to support union political activities they disagreed with. One of the rebuttals against Janus' argument was that agency fees only covered the cost of employee representation during collective bargaining, and not political activities. Thus, much of the debate in the case focused on the question of whether or not union representation in collective bargaining constituted political activity. It also focused on legal precedents underpinning the case, including the 1977 case of *Abood vs. Detroit Board of Education*, and the question of whether or not the court would be justified in overturning it (Totenberg, 2018).

Janus, the plaintiff, argued that being forced to pay fair share fees essentially amounts to being forced to finance political lobbying, which violates employee's first amendment rights (Howe, 2018). A majority of Supreme Court Justices agreed, with Justice Alito stating in the court's opinion "...The First Amendment does not permit the government to compel a person to pay for another party's speech just because the

government thinks that the speech furthers the interests of the person who does not want to pay," (as cited in Howe, 2018), (Janus vs. American Federation of State, County, and Municipal Employees Council 31, 2018). The unconstitutionality of agency fees, he argued, would therefore justify overturning *Abood vs. Detroit Board of Education,* which declared that agency fees were permissible as a way to keep "labor peace" and prevent non-union members from reaping the benefits of union representation without paying for it (also known as "free riding") (Howe, 2018).

Supreme Court Justices Kagan, Sotomayor, Ginsburg, and Breyer, however, argued against dismantling agency fees. They not only disagreed with Alito on the constitutionality of *Abood,* but feared that overturning it and siding with Janus would have much larger repercussions. "You're basically arguing, do away with unions," said Sotomayor to William Messenger, the National Right to Work Foundation attorney representing Mark Janus during the case (Howe, 2018).

In order to fully understand the opposing side's reasoning, one must look back to both *Abood vs. Detroit Board of Education* and *Friedrichs vs. California Teachers Association,* another agency fee-focused case that deadlocked the Supreme Court in 2016 following the death of Justice Antonin Scalia. One of the major arguments by the California Teachers Association in the 2016 case was that by allowing all employees representation under one contract, agency fees would enable the government entity, acting as the employer, the simplicity of negotiating with only one group of organized employees, as opposed to many competing groups. This arrangement would help maintain peace and stability among employees, and reduce the likelihood of internal

unrest and strikes (Totenberg, 2018). Citing this evidence in the court's dissent, Justice Kagan argued that *Abood* "Struck a stable balance between public employees' First Amendment rights and government entities' interests in running their workforces as they thought proper" (as cited in Howe, 2018), (Janus vs. American Federation of State, County, and Municipal Employees Council 31, 2018). Ending the collection of agency fees, they argued, would throw off this balance, creating a new set of complications for unions, employers, and the public (Howe, 2018).

In the end, the court ruled 5-4 in favor of Janus, overturning the 1977 *Abood* case and declaring agency fees unconstitutional. Following the ruling, Elena Kagan, who wrote the main dissent in the case, warned that there could be devastating consequences for public employees across the nation, saying that the majority in this decision acted:

> ...With no real clue of what will happen next—of how its action will alter public-sector labor relations. It does so even though the government services affected—policing, firefighting, teaching, transportation, sanitation (and more)—affect the quality of life of tens of millions of Americans." (as cited in Howe, 2018), (Janus vs. American Federation of State, County, and Municipal Employees Council 31, 2018).

In line with Justice Kagan's warning, Education Policy experts predicted disastrous results for unions and the overall economy following a decision in favor of Janus. A May 2018 report from the Illinois Economic Policy Institute predicted that union membership would drop by as much as 8 percent, and that public employees could see a decrease in wages as high as 4 percent. This would likely make public sector

careers less attractive to middle-class workers, creating negative effects for the economy (Manzo & Bruno, 2018). Similarly pessimistic, a June 2018 report out from *Education Next*, which analyzed the effects of "right-to-work" laws on NEA affiliate membership and revenues in Wisconsin and Michigan, predicted that teachers unions could emerge from the *Janus* decision "permanently crippled." Significant drops in membership and dues collection, it suggested, could make it very difficult for unions to continue to influence policy. That said, these changes for unions, they hypothesized, may contain a silver lining (Marianno & Strunk, 2018).

Taking on a more optimistic tone, the same report went on to suggest that these negative effects do not necessarily mean weak unions. Other evidence, they argued, has shown that teachers unions are becoming more resourceful and adaptive by doing things like financially restructuring union employees' salaries and benefits, partnering with (gasp!) Republicans with whom they can find common ground, and, perhaps most importantly, focusing more on rank-and-file teacher voice. One part of this final piece, they said, is changing the way teachers unions relate to their members, investing more time and attention on each individual, and showing them how union action benefits them individually. Another part of this focus on teacher voice, they argued, is harnessing the collective power of union educators through activism. Indeed, in states where education funding has suffered, teachers have banded together in protest and successfully won improvements on both "bread and butter" issues, like pay and working conditions, and structural outcomes that support student learning. All together, said the authors, these

actions suggest that unions may be more resilient than their opponents expected (Marianno & Strunk, 2018).

Teacher decisions around union membership and engagement in a post-Janus world

Whether or not teachers unions will become "permanently crippled," as many fear, or survive and thrive in a rapidly changing world, is ultimately in the hands of educators. With the newfound freedom to opt out of union membership, an important question remains: How will teachers engage with unions after Janus? Those seeking to find an answer to this question must educate themselves on the issues affecting teachers' attitudes and beliefs surrounding teachers unions and their decisions around union membership and engagement in a post-Janus world. This work will directly inform the research question *How do teachers make decisions around union membership and engagement in my middle school setting?* A handful of studies have examined different elements of this question. An analysis of these studies reveals that the following variables are important in understanding the forces that drive union engagement:

Active vs. Inactive and non-union members. One study I reviewed in my analysis of teachers' attitudes, beliefs, and behaviors around union membership and engagement sought to find the distinctions between "active" union members and "inactive" union members. In a mixed-methods study, Kara Popiel (2013), conducted a survey of over 300 union members, as well as interviewed 30 of these respondents. The survey asked members to identify themselves as "active" or "inactive" union members, and did not define either term for participants. Popiel found that both those who identified themselves as active members and those who identified themselves as inactive members indicated

that they valued the protections and support unions gave them, especially when it came to negotiating better job protection and workplace security. Teachers in both groups also expressed that they valued the unions for helping teachers secure better working conditions, pay, and benefits. Even though all members valued union protection, some members, both active and inactive, indicated that they were unhappy with the union's protection of ineffective teachers. Nonetheless, these same individuals and almost all respondents indicated that union protection was "necessary" and "inevitable." Popiel also found that both active and inactive union members valued the sense of political voice that unions give teachers, but, interestingly, feelings that their particular union did not invite or represent all of its members' voices was a factor that separated inactive members from active members (Popiel, 2013).

Other issues discussed in this study helped to illuminate the differences between active and inactive members. Many inactive members reported having had negative experiences with union leaders early in their career that led them to become inactive. In addition, more inactive members expressed discontent with the fact that the union protected teachers they believed to be inadequate, and felt the unions' professional values were not consistent with their own. They also felt that their union did not do enough to engage members or support students. These findings led Popiel to conclude that it was the participants' perceptions of the union's "moral legitimacy," or the belief that the union's values were consistent with their own, that separated active members from inactive members. The major implications of these findings was that teachers unions

would need to “shift the moral center” of their organizations to reactivate and engage with their members (Popiel, 2013).

In a study comparing current teachers union members with former union members, Sydney Chapman (2013), interviewed five current union members and five former union members in a public school district within the non-bargaining state of Georgia. Her unstructured interviews with participants revealed similar beliefs around union benefits, but also concerns around union dues, union efficacy, and teachers’ understanding of unions in general. Again, all of the participants indicated that the protections the teachers union provided, such as liability insurance, greater job security, and legal representation, were extremely valuable. In fact, all members expressed that without the union, working conditions in the district likely would be less desirable. In this case, however, former union members cited the increasing costs of union membership fees, as well as the union’s limited powers to advocate for their members in a non-bargaining state, as reasons for leaving. Those who stayed all seemed to indicate satisfaction with the union because they were actively engaged in committees or leadership roles and had benefited firsthand from the union’s services. Implications for the study were that current union members should be given more opportunities for leadership and specialized training to help non-members better understand the functions and purposes of the union. These opportunities would not only better engage current members, which would likely promote union satisfaction, but also help new members understand how the union serves teachers and why it is valuable (Chapman, 2013).

Novice teachers vs. veteran teachers. Rather than comparing teachers by union membership status, Pogodzinski and Jones (2014) conducted a quantitative study of the differences between novice teachers and veteran teachers in terms of their attitudes and behaviors surrounding teachers unions. Participants from six Michigan school districts and five Indiana school districts were asked to respond to two surveys created to gather data about the teachers' educational settings, roles within their schools, years of teaching experience, participation in union activities, and attitudes, beliefs, and perceptions of the union. Results showed that veteran teachers were more likely to be union members who actively attended meetings and participated in union political activities. The researcher noted that while lower union participation among novice teachers could potentially be due in part to the overwhelming workload of beginning teachers, the differences may also reflect a sense of detachment from the union among novice teachers. In responses regarding the union's engagement with its members, veteran teachers expressed greater desire than novice teachers for union involvement in their work lives, especially when it came to teacher evaluation and fringe benefits. In addition, how novice teachers perceived their unions and what they most desired from them also varied depending on the teacher's organizational context. Teachers who felt more overloaded and overworked desired more union involvement in their work lives, while teachers who were feeling less overloaded indicated less desire for union involvement. Researchers concluded that in order to better engage their newest members, unions should make more of an effort to understand what novice teachers desire and need from their unions as well as how their

organizational contexts affect their perceptions and thoughts about union involvement (Pogodzinski and Jones, 2014).

Millennials vs. non-millennials. Other studies have examined teachers' perceptions and behaviors of unions from a generational standpoint. One study by Heidi Swenson-Chipman (2014) analyzes millennial union members' (defined in the study as individuals born between 1980 and 2000) perceptions of their local and state union as well as their beliefs regarding the union's role in reform. In order to uncover these perceptions and beliefs, the researcher administered a web-based survey to 259 union members of varying ages in southern California. In addition, the researcher selected nine millennial survey participants to share their perspectives in person through one-on-one interviews (Swenson-Chipman, 2014).

One key finding of the research was that millennial union members greatly valued the protections unions provided, including job protection, better working conditions, and "checks and balances" to district leadership (Swenson-Chipman, 2014). Because many novice teachers were also millennials, this finding is somewhat consistent with the findings of Pogodzinski and Jones (2014), discussed above. The researchers noted that the findings of this study were somewhat inconsistent with the literature, however, which supports the idea that, unlike veteran teachers, millennial teachers prioritize issues of career development over issues of job security. All millennial members interviewed in this study seemed to show significant appreciation for the union's protection on these "bread and butter" issues. However, the millennial union leaders interviewed in this study did acknowledge that there seemed to be a growing engagement problem among their

peers, who appeared uninterested in involvement beyond their own classrooms (Swenson-Chipman, 2014).

Another key finding of this study was that most respondents believed the union needed to change its methods to better engage its millennial members. Some suggestions for how to do so included but were not limited to: making better use of new technologies, including social media, for communication purposes, explicitly teaching new members about the history and the purpose of teachers unions, getting "creative" with how they reach out to members in order to reach busy millennial teachers with families, and putting a more positive "spin" on unionism to dispel current negative feelings around it (Heidi Swenson-Chipman, 2014). These suggestions all contributed to a general feeling that past methods of member engagement used for previous generations were no longer relevant or effective for this new group of teachers.

Finally, millennial members expressed frustrations and discontent due to the fact that many aspects of the way their union conducted business were "archaic." For some, early experiences in the union were negative because of the overwhelming presence of other veteran union members with "dominant personalities." Others expressed that they saw more "venting" of frustrations at union meetings than the proposing of solutions. Still others expressed that the union's core beliefs had become extremely polarized, and that they had become organizations disconnected from actual students, serving only to protect the status quo. These ideas hearken back to Popiel's study above, and the idea that in order to embrace unions, teachers must feel a moral alignment with them. Major priorities for this group of millennials were changing both the union's image and its

reform efforts. This included improving public relations and embracing education reforms deemed to be less popular with older generations of teachers, such as changing the teacher evaluation process and the seniority system. Most of the educators interviewed also felt that the union needed to be more open to collaboration with younger teachers in order to better fit the needs of millennials (Heidi Swenson-Chimpan, 2014).

Given these findings, the researcher made a set of recommendations for unions in order to help them better engage millennial members in the future. These recommendations included involving millennial members in more union leadership roles, especially with regards to new technologies, like communication through social media, and making special efforts to gain the perspectives of members who had previously been underrepresented. In addition, the researcher recommended that teachers unions seriously consider the views of millennial teachers when it comes to education reform, and make significant changes to their teacher evaluation systems in line with those views. As more and more veteran teachers retire, the researcher argued, the roles of millennial teachers will become increasingly important in U.S. education. Unions, therefore, need to adapt to better accommodate the changing needs of their members (Heidi Swenson-Chipman, 2014).

The role of agency fees. One factor not explored by the previous studies is the role of agency fees, and how teachers union membership and engagement would change if teachers were no longer required to pay them. A 2018 study by the organization *Educators for Excellence* explored this issue in anticipation of the *Janus* decision, which came down just months after its results were collected. The survey, which covered a wide

range of topics relevant to public education, was completed by a representative sample of 1,000 licensed k-12 public educators from across the country. It shed light on educators' attitudes, opinions, and beliefs about teachers unions, as well as the choices they were likely to make around union membership and engagement in a post *Janus* world.

Similar to previous studies, those surveyed overwhelmingly indicated that they believed the working conditions and salaries of teachers would be much worse off without unions, with 94 percent of union members and 77 percent of non-members indicating that they held this belief. A similar breakdown of educators surveyed also indicated that without unions, they believed teachers would be more vulnerable to school politics or power-abusing administrators, with 92 percent of union members and 76 percent of non-members holding this belief. Echoing the thoughts of former union members in Chapman's 2013 study described above, however, 54 percent of union members and 72 percent of non-members indicated that they believed the cost of union membership was higher than warranted. In addition, nearly one in five union members surveyed indicated that they would likely opt out of union membership if they had the chance, and 61 percent of non-members surveyed indicated that they would likely opt out of paying agency fees (or any type of union dues) if the Supreme Court were to rule in favor of Mark Janus. These findings suggested that despite their overwhelming belief that unions provide value in terms of improving teacher pay, benefits, and working conditions, many of the teachers surveyed did not believe the benefits provided by their union were worth the costs (Educators for Excellence, 2018).

Teachers unions and race. Another factor I have been curious about in relation to teachers union membership and engagement is race. I searched for studies that would somehow illuminate the beliefs, attitudes, and perceptions of educators in different racial groups around teachers unions, but was largely unsuccessful. The only resource I found that somehow explored differences between educators who identify as Black or Indigenous People of Color (BIPOC) and educators who identify as Caucasian with regard to teachers unions was an article from *The 74 Million,* which profiled the Providence, RI teachers union and its efforts to make its union and district more anti-racist through a new Racial Justice Committee (Lehrer-Small, 2020). Unfortunately, this resource was focused mainly on capturing educators' thoughts about the committee rather than on the union itself. That said, some union members' experiences are worth noting.

It was clear from both white and BIPOC educators' comments that many members felt a need for change around racial equity within the district and union. One LatinX educator on the Racial Justice Committee shared that at times she felt uncomfortable speaking her mind, and worried that other teachers would react defensively to what she had to say regarding issues of racial equity. She also wondered why there weren't more people of color on the committee itself, and felt that more BIPOC individuals should be included. Confirming the need for change, a white former committee member said: "The district and union have paid a lot of lip service to racial equity but very little has changed in the 29-plus years I've taught." Another white committee member commented that the union needed to shift from a "business union

model" to a "social justice union model" in order to make meaningful changes in the racial equity department. While acknowledging that the union still had a long way to go, a black committee member said she was encouraged by the union's steps to increase racial equity, and happy that white educators wanted to partner with her and other BIPOC educators to make it happen. "You have to start somewhere," she said.

While these educators' voices do shed light on some of the attitudes, beliefs, and opinions members of different races have around teachers unions, I am curious to dig deeper. I want to hear from more educators of different racial backgrounds about why they have decided to become union members (or why not) and how they engage in union activities. I also want to know their attitudes and beliefs about teachers unions themselves, including the ways they benefit teachers and students and the ways they need to change. I plan to address these questions through my own research around the question: *How do teachers make decisions around union membership and engagement in my middle school setting?*

Close-up on Minnesota Teachers

Because Minnesota teachers are the focus of this study, it is necessary to get a basic snapshot of the Minnesota teacher workforce before analyzing and interpreting teacher data on a micro level. The following section summarizes research on both teacher demographics and teachers unions in the state of Minnesota.

Minnesota Teacher Demographics

A report out from the Minnesota Professional Educator Licensing and Standards Board (PELSB) entitled, "2019 Biennial Teacher Supply and Demand," published the

most recent official demographic data on teachers licensed in the state of MN, including identified gender, teaching experience, and race. It found that of the 63,629 active standard-licensed teachers in Minnesota at the time data was collected (the 2017-2018 school year), 75.8% identified as female and 24.2% identified as male. It also found that approximately 3.8% of the active standard-licensed teachers were newly licensed teachers just beginning their careers, while 96.2% were returning teachers who had previously worked in school districts within Minnesota or other states. Of all the teachers actively employed by schools in the state of MN during this time frame, 98.1% were licensed in the area in which they were teaching, while 1.9% were teaching in an area in which they were not licensed (Minnesota Professional Educator Licensing and Standards Board, 2019).

The same report indicated that an overwhelming majority of active-licensed Minnesota teachers identified as White (95.7%), followed by teachers who identified as Asian (1.5%), teachers who identified as Black (1.4%), teachers who identified as Hispanic (1.0%), and teachers who identified as American Indian (0.4%). Overall, only 4.3% of the teachers actively working in the state of Minnesota identified as Black or Indigenous People of Color (BIPOC). In the 7-county Twin Cities metro area, however, the percentage of teachers who identified as BIPOC was a bit higher, at 7%.

In contrast, 33.5% of MN students identified as BIPOC, making it clear that when it comes to teacher-to-student ratios, there are great disparities between white and BIPOC students in the state of Minnesota. In the 7-county Twin Cities metro area, the disparities

were even more pronounced. While the percentage of teachers who identified as BIPOC was higher, at 7%, the percentage of BIPOC students was significantly higher, at 44.4%.

Comparing more specific racial data for Minnesota teachers with the enrollment data of Minnesota students for the same time period, the report continued to reveal some stark disparities. Statewide, 66.5% of Minnesota students identified as White, 11.0% identified as Black, 9.3% identified as Hispanic, 6.8% identified as Asian, 4.7% identified as multiracial, 1.6% identified as American Indian, and .1% identified as Hawaiian/Pacific Islander. Therefore, while the percentage of white teachers was higher than the percentage of white students in the state of Minnesota, all students identifying as Black or Indigenous People of Color (BIPOC) were proportionally underrepresented by their teachers, and some racial/ethnic groups were not represented at all within the Minnesota teacher workforce. The widest gaps between teachers and students identifying as BIPOC were among those who identified as Black, with a difference of 9.6%, and those who identified as Hispanic, with a difference of 8.3% (Minnesota Professional Educator Licensing and Standards Board, 2019).

Minnesota Teachers Unions

Minnesota has a long, proud, history of teacher unionism. In 2018, the state teachers union, Education Minnesota, produced a video entitled: “Our Shared Legacy,” which explains major developments in the history of the state’s teacher organizing. It details how Minnesota educators first began to organize in 1861, when they formed the Minnesota State Teachers Association. This association would later come to be known as the Minnesota Education Association, or MEA. From there, Minnesota teachers

organized at all levels, forming local MEA affiliates and playing an important role in creating the National Education Association, or NEA, whose headquarters were in fact located in Winona, MN for 25 years (Education Minnesota & The Labor Education Service at the University of Minnesota, 2018).

In St. Paul in 1918, some local MEA affiliates decided to break off from the MEA and join the American Federation of Teachers, which was part of the American Federation of Labor, at the forefront of the growing labor movement. More local affiliates followed them, and over the next 80 years, Minnesota local teacher organizations chose to be affiliates of either the Minnesota Federation of Teachers (MFT) or the MEA, with trailblazing teachers leading organizing efforts on both sides. The St. Paul Federation of Teachers, originally an MFT affiliate that is now known as the St. Paul Federation of Educators (SPFE), was the first local teachers union in the nation to strike in 1946. Later, in 1970, teachers in Minneapolis went on strike, helping usher in the passage of the Minnesota Public Employment Labor Relations Act, or PELRA. Up until this time, it had been illegal for public school teachers and other public employees to walk off the job, and this critical legislation made it legal for public employees to strike, in addition to many other new labor provisions (Education Minnesota & The Labor Education Service at the University of Minnesota, 2018).

After years of separately organizing for better pay and working conditions for teachers and other school staff, as well as demanding equitable treatment and opportunities for both educators and students throughout Minnesota, the MEA and the AFT decided to stop competing and combine their organizing efforts. They came together

in 1998, making Minnesota the first state ever to merge its AFT and NEA affiliates. Education Minnesota, the product of the merger, became one of the state's largest unions. It has been leading Minnesota teachers in organizing for twenty-two years (Education Minnesota & The Labor Education Service at the University of Minnesota, 2018).

In terms of Education Minnesota's membership numbers, it is somewhat difficult to get a precise snapshot of the most current data. There is significantly more accessible data on Minnesota teachers union membership for past years than for recent years. In 2012, authors Amber W. Winkler, Janie Scull, and Dara Zeehandelaar of the Thomas Fordham Institute, a conservative education policy think tank, put out a report entitled: "How strong are U.S. teacher unions? A state-by-state comparison." This report, which ranked each state's teachers unions within five areas, gave Minnesota an overall ranking of 14th in the country in terms of strength. Within the five areas studied, it was ranked third in the nation for "Resources and Membership," 32nd in the nation for "Involvement in Politics," second in the nation for "Scope of Bargaining," 46th in the nation for "State Policies," and 19th in the nation for "Perceived Influence." The state's rankings were bolstered by its teachers union membership (95.7% of teachers were union members at the time of the report), its generous state education spending and collective bargaining laws, and Education Minnesota's general reputation as influential. At the same time, the state's "union- *un*friendly" policies and its teachers unions' relatively limited role in politics, however, dragged it down in the rankings (Winkler et al, 2012).

The report gave a fairly detailed account of Minnesota teachers unions' strengths and weaknesses at the time it was written, but much has changed since 2012, and it seems

no similar analyses of Minnesota teachers unions, or other state teachers unions for that matter, have yet been published. While Education Minnesota reports that it currently serves 80,000 members, it has not published a more detailed breakdown of that data. Because Education Minnesota members include not only licensed teachers but also Education Support Professionals (ESPs), faculty at state universities and community and technical colleges, college students preparing to enter the field of education, and retired educators, it is difficult to identify the number of licensed teachers in the state of Minnesota who are currently union members. The full impact of the recent *Janus* decision on Minnesota teachers union membership and engagement is therefore difficult to measure, leaving many unanswered questions for future scholars.

Summary

The purpose of this chapter was to provide readers with background on the past, present, and future of teachers unions, and connect that history with the literature on teachers' beliefs, perceptions, and behaviors surrounding teachers unions as well as their union membership and engagement. The chapter began with a short history of teachers unions, focusing on how the two major teachers unions, the NEA and the AFT, have shaped the public education system over the years and evolved into the organizations they are today. This section was followed by a brief explanation of the political climate and debate surrounding U.S. teacher unions, including the many arguments for and against them. The next section explored the future of U.S. teachers unions, including a discussion of the forces that seek to undermine them, such as charter schools, U.S. Supreme Court cases, demographic shifts, and post-recession economic trends. It also outlined the

established research informing discussion on the question: *How do teachers make decisions around union membership and engagement in my middle school setting?* The final section gave background on the Minnesota teacher workforce and its teachers union, including union history, strengths and weaknesses, and published membership data.

This literature review was conducted in an attempt to identify the major issues surrounding teacher unionism and how those issues have evolved over time. It was also conducted in order to identify links between past teachers union engagement trends and challenges that will affect teachers unions into the future. Additionally, the focus on Minnesota teachers and teachers unions was meant to provide background information and context into the issues examined in this study. All together, this research will help answer the question: *How do teachers make decisions around union membership and engagement in my middle school setting?*

Chapter 3 will further illuminate questions uncovered in the Literature Review requiring further scholarship. It outlines the methods that will be employed in order to answer the research question, and specifies the research paradigm chosen to investigate the topic. The overall goal of the study is to gain insight into how teachers make decisions about union membership and engagement by surveying and interviewing educators about many of the issues highlighted in chapter 2.

CHAPTER 3

Methods

Chapter Overview

This chapter presents a detailed explanation of the methods used to answer the research question, *How do teachers make decisions around union membership and engagement in my middle school setting?* It begins by discussing the research paradigm and rationale for why it was specifically chosen, highlighting the researcher's overall goal of connecting and explaining quantitative survey findings with qualitative interviews. This section is then followed by a description of the specific research methods employed and a description of the setting and participants. It will also focus on the steps taken to ensure ethical treatment of human subjects participating in the study, the research tools used to measure union engagement, and the methods used to analyze data gathered from participants. Each of these components of the research and how they were specifically structured to measure union engagement in my school district is explained in greater detail in the following sections.

Research Paradigm & Rationale

Taking into account the many factors affecting union membership and engagement in my literature review, I chose a mixed-methods research paradigm for this study. The mixed-methods paradigm has only been in practice as an official research approach for a short time within the fields of social and human sciences, and is known by several other names, including "Integrating," "Synthesis," and "Multimethod," just to

name a few (Creswell, 2007). Researchers Johnson, Onwuegbuzie, & Turner (2007), were interested in how experts within the fields of social and human science defined mixed methods research, and analyzed several researchers' definitions of this paradigm in order to come up with a single working definition. Their research led them to assert that mixed-methods research is "...An intellectual and practical synthesis based on qualitative and quantitative research." Because my study will analyze teachers' decisions around union membership and engagement by combining and connecting results from both a quantitative survey and qualitative interviews, my study meets this definition.

According to Creswell (2007), there is general agreement within the academic community that the fundamental components of mixed-methods research include rigorous collection of both quantitative and qualitative data, as well as analyses that somehow integrate the findings of these two types of data sources. This type of research also involves strategically timed and structured organization of quantitative and qualitative research components, and in addition can be connected to an overarching theory or philosophy (Creswell, 2014). While the mixed-methods research paradigm is a relatively recent development, its origins reveal a much longer history.

The basic idea of balancing quantitative and qualitative methods of study reaches back as far as the debates between Plato, who espoused singular or universal truths, Aristotle, who espoused "balances or mixtures of the extremes," and the Sophists, who espoused multiple or relative truths. The researchers who first combined qualitative and quantitative methods in recent history were cultural anthropologists and fieldwork sociologists (Johnson et al, 2007). Support for combining both quantitative and

qualitative methodologies grew in the 1950's and 60's, when researchers Webb, Campbell, Schwartz, and Sechrest (1966), referred to this practice as "multiple operationalism," and wrote about "triangulation." Triangulation is essentially the practice of studying a single phenomenon by gathering and analyzing data using different research methods (Johnson et al). Later, in 1978, another researcher named Denzin wrote about four different types of triangulation, including data triangulation (conducting studies of one set of phenomena through multiple sources), investigator triangulation (conducting studies of one set of phenomena through multiple researchers), theory triangulation (conducting studies of one set of phenomena from the background of multiple perspectives or theories), and method triangulation (conducting studies of one set of phenomena using multiple methods or instruments) (as cited in Johnson et al, 2007).

Other researchers continued to expand on the idea of triangulation and outlined the benefits of mixing research paradigms in the years to come, writing about research practices such as "critical multiplism" and "methodological pluralism," (Johnson, et al, 2007). As a result, the field of mixed-methods research gained more and more prominence throughout the 1980's and 90's, and spread throughout the world as a viable research paradigm for studying the social and behavioral sciences. In 2003, researchers Tashakkori & Teddlie published their *Handbook of Mixed Methods in the Social and Behavior Sciences*, which explained the mixed-methods paradigm in detail (as cited in Creswell, 2007). There are now many journals and publications devoted to mixed-methods research, and the field continues to grow (Creswell, 2007).

I came to the decision that a mixed-methods study would be the most appropriate research paradigm for my research question because of its integrative approach to data collection and analysis. I chose a quantitative survey as one major component of this mixed-methods paradigm because I wanted to get a broad sense of the factors involved in teachers' decisions around union membership and engagement, and be able to draw general conclusions about my sample that could be generalized to the overall population. This, Creswell (2014) argues, is the purpose of survey research. At the same time, however, I also wanted to get a more in-depth sense of teachers' individual decisions around union membership and engagement, and have conversations with them that would help uncover the reasons for these decisions. Hence, I decided to add a series of qualitative, semi-structured interviews to my study in order to connect broader survey findings to more personal participant data. My overall goal is to use the qualitative findings of this study to explain the quantitative findings. This will create a stronger connection between empirical and anecdotal evidence, which will help me answer the question *How do teachers make decisions around union membership and engagement in my middle school setting?*

Choice of Method

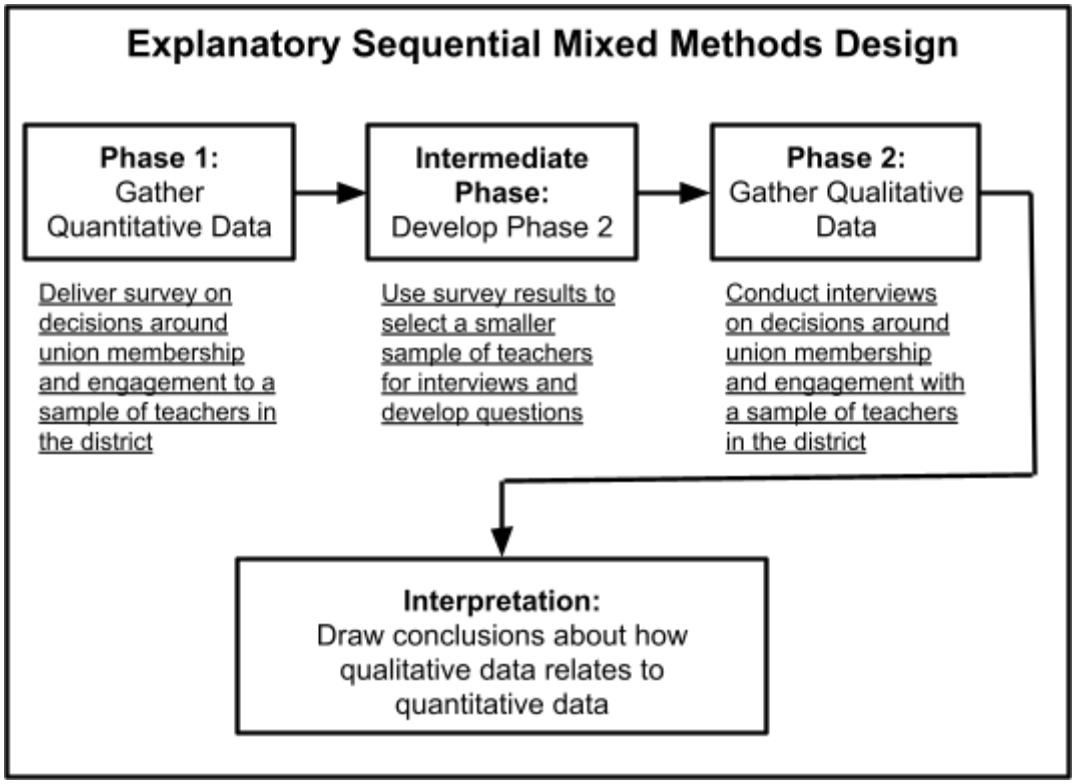
Because the goal of this capstone is to move from a broad analysis of the research question through survey data to a more in-depth, personal analysis of the research question through semi-structured interviews, I decided to use an Explanatory Sequential Mixed Methods design for this study. According to Creswell (2014), this type of research design happens in two phases. In the first phase, the researcher gathers quantitative data,

then analyzes it, and uses it to develop the criteria for the second phase, which is qualitative. In such a design, the researcher often uses data from the first phase to more strategically define the participants and/or questions or instruments that will be used in the second phase. “The overall intent of this design is to have the qualitative data help explain in more detail the initial quantitative results,” says Creswell (2014). For a visual outline of this research design and how it will be used in this particular study, please see Figure 1 below.

While this particular research design is especially helpful for drawing connections between two different forms of data, there are also some challenges associated with it. First of all, the amount of time the researcher must devote to planning, collecting, and analyzing two forms of data is significant. In addition, using a Mixed Methods design requires the researcher to be knowledgeable of both qualitative and quantitative research methods, and extremely clear and thorough throughout the presentation of these methods, data, and analysis (Creswell, 2014). Indeed, conducting two phases of research and drawing separate and joint conclusions about them is a time-intensive and complicated process, but the hope is that such a design will deliver richer results.

Figure 1

Explanatory Sequential Mixed Methods Design



Setting and Participants

The setting for this Mixed-methods study is a middle school within a large suburban school district in a midwestern state. The district is among the top five largest school districts in the state, and serves roughly 20,428 students. Of the students served by the district, 43% identify as white, 25% identify as black or of African descent, 16% identify as Asian, 9% identify as Hispanic or Latino, 7% identify as being of two or more races, and 0% identify as American Indian or Alaska Native. In addition, 10.9% of students receive English Language Learner services, 11.1% receive Special Education

Services, 43% receive free or reduced lunch, and 0.9% of students are considered homeless (Minnesota Department of Education, 2018). While it is important to understand the school district's student demographics in order to get a good sense of employees' work setting, the population studied is not actually students but the approximately 75 licensed teachers employed in my middle school building.

The sample of teachers for the first phase of research will be obtained after an electronic survey, developed to answer the research question, *How do teachers make decisions around union membership and engagement in my middle school setting?* is sent out to all licensed teachers in my middle school building. The teachers who respond in full will become official participants in phase one of the study. Their responses will then be analyzed and coded for planning of stage two.

After analyzing the survey results and determining different factors that may have distinguished certain teachers from others in their responses, such as age, years of experience, or participation in local union activities, I will then select a smaller cross-section of participants who represent a variety of different subgroups (i.e. Veteran teachers, new teachers, men, women, millennials, older teachers, union members, non-members, etc.). These participants will become the candidates for the qualitative interview in stage two, and I will request in-person or phone interviews with these candidates via email. Those who respond positively and participate in the interview process will become official subjects of phase two.

Research Instruments

The research instrument for phase one of this study was an electronic survey developed using Google Forms (see Appendix B). The survey was created to gather basic information about teachers, such as their teaching assignment, years of experience, age, race, and gender, as well as information about their engagement with their local union. After obtaining approval from my principal and the district's director of Research, Assessment, and Accountability, I sent out the survey via email to all licensed teachers in the building. Teachers who chose to participate in the study gave their informed consent and sent their responses using the Google Forms platform. I then used these responses to develop semi-structured interview questions, which became the primary research instrument for phase two.

In order to identify potential participants for phase two of my research, I analyzed the information gained from my survey in phase one and made a list of initial participants who indicated that they were willing to participate in a semi-structured interview. I then contacted several of these potential phase two participants via email, inviting them to participate in the next phase of my research and giving them further information on how to schedule a google meet interview. After hearing back from most of these individuals, I then selected five willing participants for phase two and proceeded to schedule and conduct interviews with them. As discussed in the "Setting and Participants" section above, my goal was to select five participants who represented a variety of different teacher subgroups in order to reflect the variety of different teacher subgroups within the wider teaching community. Because of the fact that the nation was in the midst of the

COVID-19 pandemic, I made the decision to conduct all semi-structured interviews via google meet video conferencing rather than in person. I also gained participants' consent to participate in these interviews by sending them an electronic version of the phase two consent form (see Appendix C) and collecting their electronic signatures using a google chrome-based application called DocuSign. Per the phase two consent form, I also made recordings of the interviews using google meet or voice memos on my phone, and retained these recordings until after my capstone was completed. In addition, I took notes documenting participants' responses in google document copies of the original semi-structured interview template.

Ethical Considerations

Prior to sending out the initial survey in phase one of my research, I worked with my capstone committee advisor to submit a Hamline University Internal Review Board (IRB) application. Upon receiving approval to complete the project, I drafted my two letters of informed consent: one that was embedded within the first section of my survey in phase one, and therefore completed by all survey participants (see appendix B), and another that was given to all interview participants (see appendix C). In both of these letters, I explained my research topic and gave an outline of the study procedure, as well as explained how I intended to gather and use participants' data using the given instrument (survey or interview). Because, as a researcher, it was extremely important to me to respect all participants' rights to privacy and confidentiality, I assured them that their personal information would not be shared with anyone but myself, the researcher, and that the final report of the project would use pseudonyms to refer to the district,

school, and participants. I also explained that while my results would be posted in the Hamline University Bush Library Digital Commons and possibly also published or used for other purposes such as in presentations at professional conferences, I still promised to respect their privacy and maintain their anonymity.

I presented this letter to my building principal along with a copy of my survey and a document that gave a brief description of my study, research goals, a general procedure, and timeline for my data collection. My principal willingly signed both of these documents and expressed her support for my project. I then electronically submitted this same set of documents to my district's director of Research, Assessment, and Accountability, along with an application for conducting research within the district, which explained my research goals and answered relevant questions related to ensuring ethical treatment of human participants. After reviewing these documents, the director of Research, Assessment, and Accountability contacted me via email letting me know that my application to conduct research in the district had been approved, and I began the next step in collecting data.

Data Analysis

After submitting my survey to all licensed teachers within my middle school building, 32 out of 75 teachers gave their informed consent using the form embedded within the first section of the survey and sent back responses. I then analyzed the results using overall percentages of the sample population and descriptive statistics (mean, median, and mode). I also studied teachers' responses in order to come up with a plan for how to construct a smaller sample for the interviews in phase two. In addition, I

documented the differences in measures of union membership and engagement according to different teacher criteria, including age, years of experience, and race. The goal of this process was to get a general sense of teachers' union membership and engagement by group, and identify any possible mediating factors.

Using my initial analysis of the survey, I then developed a set of open-ended interview questions to ask participants in phase two (see Appendix D). My goal for the interviews was to obtain more in-depth answers from participants and better illuminate the thinking behind their decisions related to union membership and engagement. I also combed through survey results to identify a smaller group of individuals who were willing to participate in semi-structured interviews in phase two. I then used the email addresses they provided to contact these individuals and set up interviews over Google Meet. After most participants had responded, I then selected four individuals who seemed to represent a wide variety of perspectives on unions as well as teacher subgroups within the larger teaching community. I then responded to these specific individuals via email and proceeded to arrange interview times and locations according to the participants' convenience. Before beginning each interview, I sent an electronic copy of the phase two informed consent form (See appendix C), and made sure I had received the participant's signature before beginning to record the interview or asking any questions.

When interviews were complete, I listened to all the recordings I had made and made notes into four different copies of the google document with semi-structured interview questions (see appendix D). Then, after compiling this data, I reflected on the major ideas and themes participants spoke about and began writing notes about the key

findings that emerged. I created a list of the major themes uncovered in the interviews and how they related to survey data, as well as how they related to themes identified in the literature review. I then used this list to write my conclusions, which are described in detail in the next chapter.

Summary

The methods described in this chapter were designed in order to answer the research question, *How do teachers make decisions around union membership and engagement in my middle school setting?* This section of the study gave a short history and explanation of the Mixed-methods research paradigm, and a rationale for why it was chosen for this particular study. In addition, chapter three outlined the general procedure for studies using an Explanatory Sequential Mixed Methods design, and explained plans for the major components of the study, including setting and participants, research instruments, ethical considerations, and data analyses.

Chapter four will present an official report of the research findings, as well as identify the major conclusions gathered from analyses of phases one and two of the study.

CHAPTER 4

Results

Chapter Overview

This chapter details the results of the survey and semi-structured interviews explained in Chapter 3. To review, the purpose of this study is to better understand the many factors that play into teachers' decisions around union membership and engagement. In order to investigate this topic, I formed my central research question: *How do teachers make decisions around union membership and engagement in my middle school setting?* I attempted to answer this question by creating an electronic survey exploring my colleagues' beliefs, perceptions, and behaviors surrounding union membership and engagement. The survey also collected teachers' demographic information, which I used to better understand how teachers' membership in various subgroups (i.e. new teachers, veteran teachers, millennial teachers, older teachers, teachers of color, etc.) might mediate their union membership and engagement decisions. After gathering and analyzing these initial survey results, I then developed semi-structured interview questions designed to investigate my colleagues' decisions around union membership and engagement on a deeper level. From the list of participants who responded to my initial survey and indicated they were willing to participate in a semi-structured interview, I selected four colleagues who I thought represented a diverse set of perspectives as well as the most important teacher subgroups identified within

survey data. Results of both the initial survey and the semi-structured interviews are explained in detail below.

Notes about the timeline

The survey used in this study was developed during the summer of 2018, immediately following the Supreme Court's decision in the case of *Janus vs. AFSCME Council 31*. My intent, initially, was to electronically submit it to colleagues in my building during the fall of 2018, just as teachers were beginning the school year. This was also the time period during which colleagues would, for the first time, have the chance to "opt out" of paying agency fees to the union. I wanted to conduct my survey at this specific point in time in order to get a sense of how educators in my building were going to react to this change in statute. Unfortunately, however, due to unforeseen issues that slowed the approval process, I was not able to release my survey to colleagues until January of 2019. After collecting and analyzing these initial survey results, I began formulating my semi-structured interview questions and preparing for phase two of data collection: the semi-structured interviews. Before completing phase two, however, I decided to seek a year-long extension to my Capstone thesis and take time off following the birth of my daughter in April, 2019. I returned to work in August of 2019, but new challenges due to the COVID-19 pandemic delayed my work yet again, and I sought another extension during the summer of 2020. Semi-structured interviews, therefore, were not conducted until July of 2020, about eighteen months after initial survey results were gathered. In the past, this would have seemed like a relatively short amount of time, wherein few major changes to the education system would be expected to take place. Due

to the global pandemic, however, the landscape of global education has shifted significantly, bringing with it a new set of challenges that could potentially impact my research question, *How do teachers make decisions around union membership and engagement in my middle school setting?* For these reasons, some ideas reflected in phase two of my research center around education in a pandemic, and were not also reflected in the survey responses in phase one.

Survey Results

Summary of Demographic Information

Of the teachers who participated in the initial survey (n=32), 37.5% identified as male and 62.5% identified as female (see figure 2). The ages of participants were fairly widespread, with 18.8% of respondents belonging to the 21-30 year age group, 37.5% of respondents belonging to the 31-40 year age group, 18.8% of respondents belonging to the 41-50 year age group, 12.5% belonging to the 51-60 year age group, and another 12.5% belonging to the 61 years plus age group (see Figure 3). In terms of race, 78% (n=25) participants identified as Caucasian, while 18.75% (n=6) identified as Black or Indigenous people of color (BIPOC), and 3% (n=1) selected "I prefer not to say." Looking more specifically at the BIPOC group, 3.1% (n=1) identified as Black/of African descent, 6.25% (n=2) identified as Asian or Pacific Islander, 3.1% (n=1) identified as Hispanic/LatinX, 0% (n=0) identified as Native American or Alaska Native, and 6.25% (n=2) identified as 2 or more races (see Figure 4).

Figure 2

Gender Identification

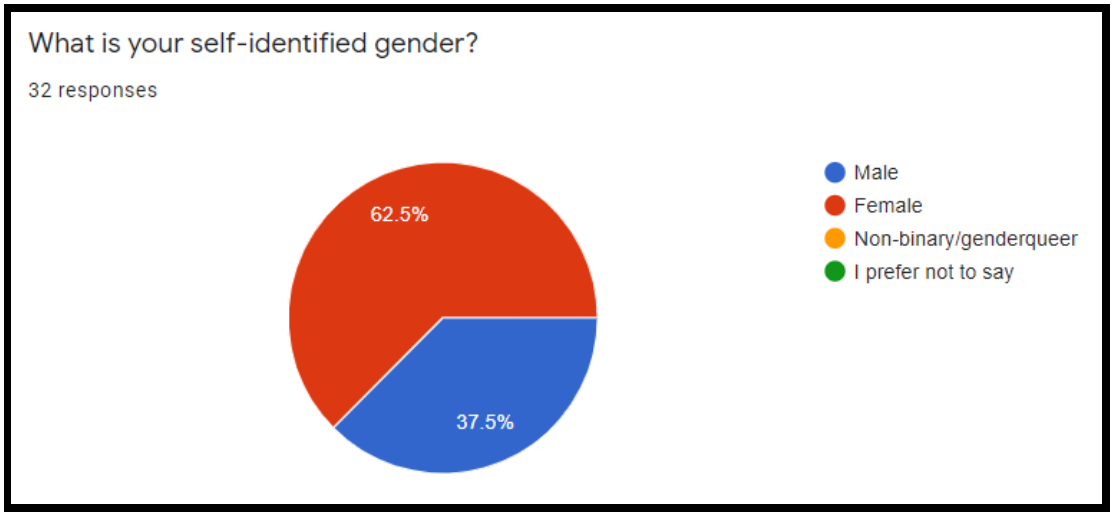


Figure 3

Age

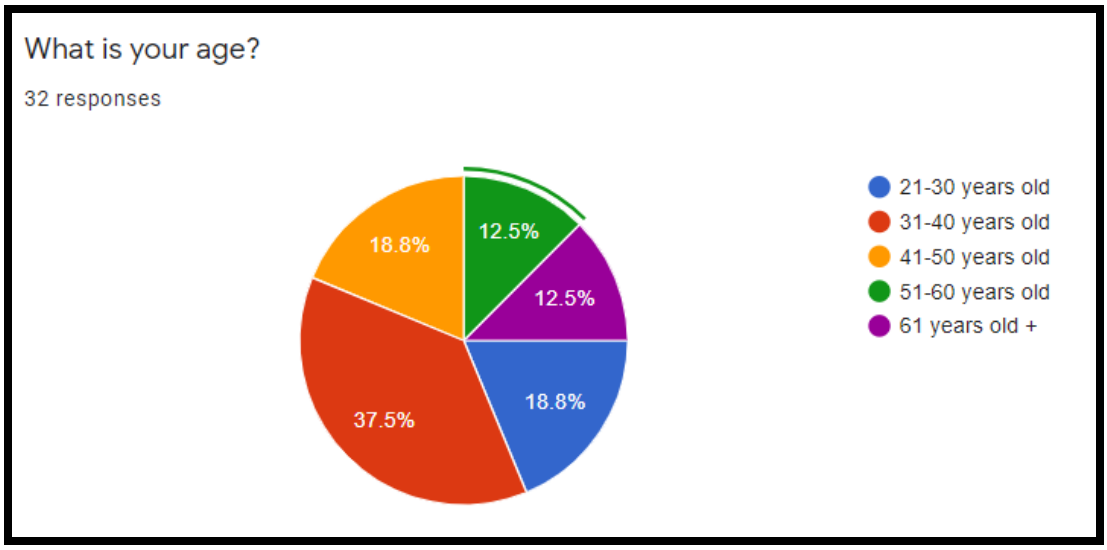
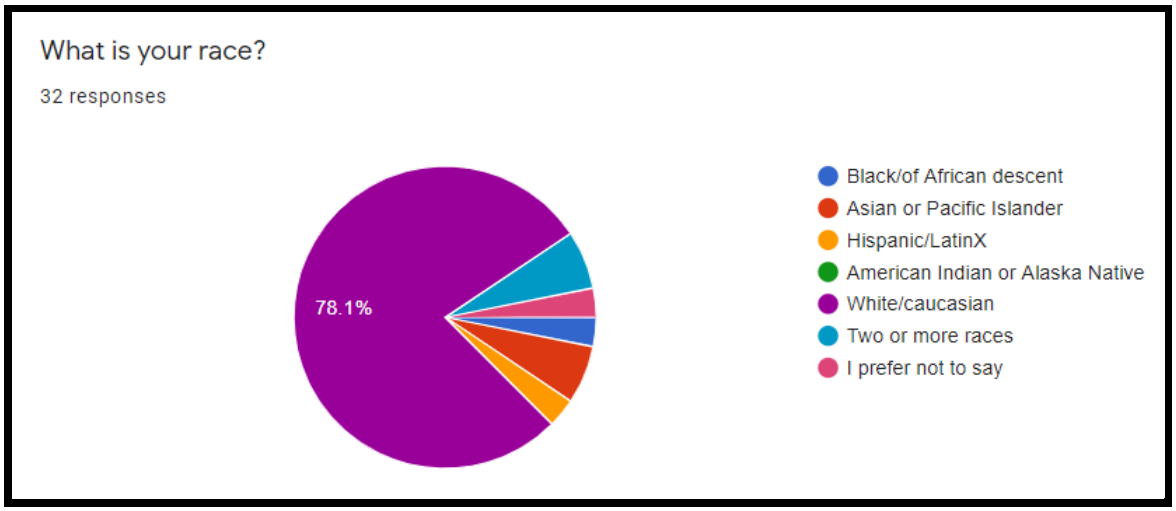


Figure 4

Race Identification

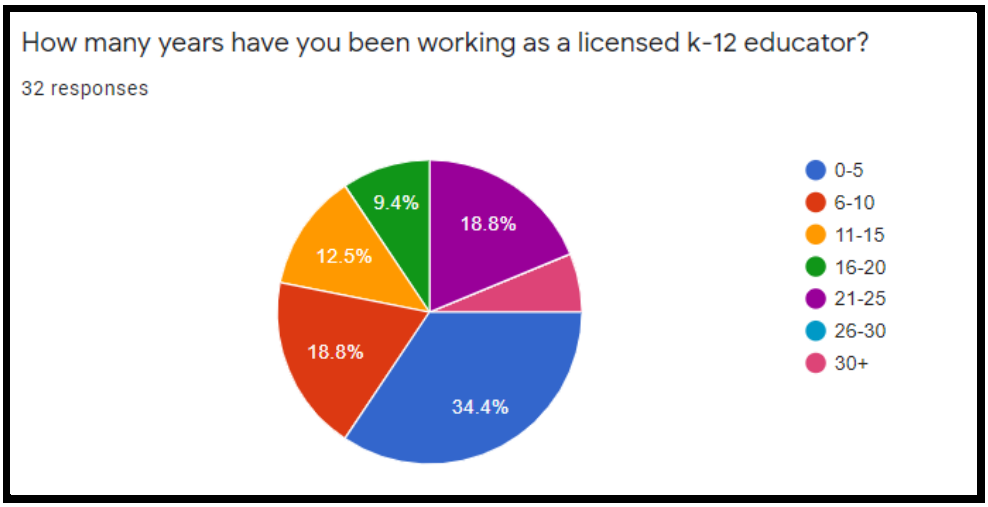


Summary of Teacher Experience, Education, and Licensure Areas Represented

A majority of teachers surveyed were newer educators in their first five years of teaching (34.4%, n=11). The categories with the next highest level of representation among teachers surveyed were teachers with 6-10 years of experience and teachers with 21-25 years of experience, each representing 18.8% of teachers surveyed (n=6). Teachers with 11-15 years of experience were the next highest category with 12.5% (n=4) of teachers surveyed represented, followed by teachers with 16-20 years of experience (9.4%, n=3), and teachers with 30+ years of experience (6.25%, n=2). See Figure 5 below for a graphic representation of this data:

Figure 5

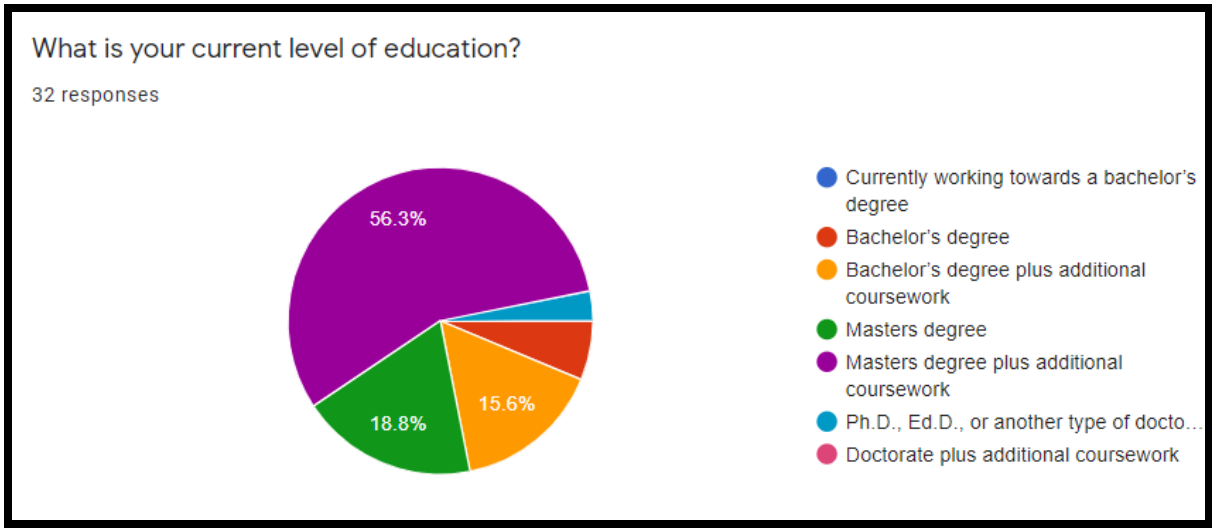
Years of Experience



As a group, the educators who participated in the survey were highly educated, with a majority of survey respondents (56.3%, n=18) holding a master's degree plus additional coursework. The category with the next highest level of representation among respondents was teachers holding a master's degree with no additional coursework (18.8%, n=6), followed by teachers holding a bachelor's degree plus additional coursework (15.5%, n=5), and teachers holding only a bachelor's degree (6.25%, n=2). One individual (3.1%) held a Ph.D., Ed. D, or another type of doctorate. Zero educators held less than a bachelor's degree. See Figure 6 below for a graphic representation of this data:

Figure 6

Level of Education



Looking at the licensure areas held by survey respondents, 15 educators (46.87%) were licensed in 2 or more areas. The most common licensure areas represented by survey respondents were Special Education, which was held by 10 educators (31.2%), Elementary Education, which was held by six educators (18.75%), English Language Arts, Math, and Social Studies, each of which were held by five educators (15.6%), and science, which was held by four educators (12.5%). Other licensure areas represented were Physical Education/Health (9.4%, n=3), reading (9.4%, n=3), English Language Learners (6.3%, n=2), and Art, School Psychology, School Counselor, Social Worker, Library Media Specialist, Keyboarding for Computer Applications, DAPE (Developmental Adapted Physical Education), and Speech Language Pathology, each of which were held by one educator (3.1%).

Knowledge of Union Services/Benefits

Average Knowledge of Union Services/Benefits was calculated by averaging individuals' responses across four questions, each of which asked participants to self-indicate their knowledgeability of the work and/or services/benefits of teachers unions at different organizational levels (local, state, national, etc.) on a Likert scale of 1-5, with 1 meaning "I know nothing about this subject," and 5 meaning "I know everything about this subject." I then analyzed respondent's averages across different categories, including years of experience, age, and race. Within each category, I added together participants' averages and then divided by the number of participants in that category to calculate an overall average.

Looking at Average Knowledge of Union Services/Benefits by age, average knowledgeability tended to increase as respondents' ages increased, with the exception of educators age 31-40 years old (n=12), for whom there was a slight dip in average union knowledgeability (see Figure 7). A similar trend was seen with average knowledge of union services/benefits by years of experience, with average knowledgeability growing as years of experience increased. Again, there was one exception: a slight dip was reported for educators with 16-20 years of experience (n=3) (see Figure 8). Looking at Average Knowledge of Union Services/Benefits by race, respondents who identified as Caucasian (n=25) indicated greater average knowledgeability as compared to participants who identified as BIPOC or selected "I prefer not to say" (n=7). The averages for the two groups differed by almost a whole point (3.12 vs. 2.28) (see Figure 9). Within all

categories discussed above, it is difficult to determine whether differences between groups are significant based on inconsistent group sizes.

Figure 7

Union Knowledgeability by Age

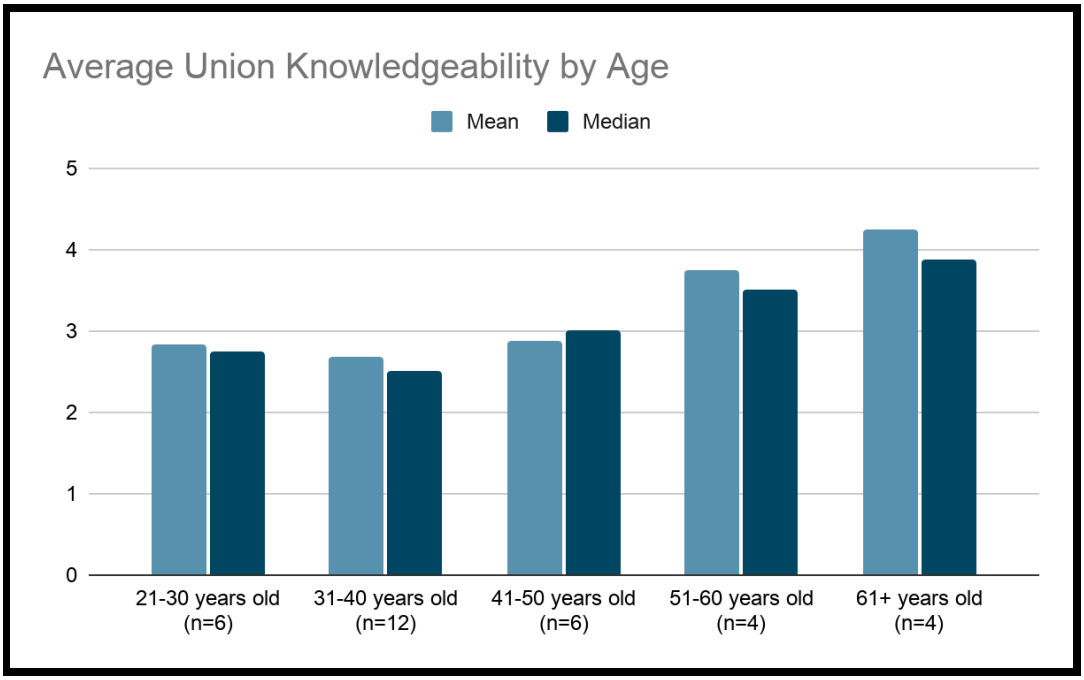


Figure 8:

Union Knowledgeability by Years of Experience

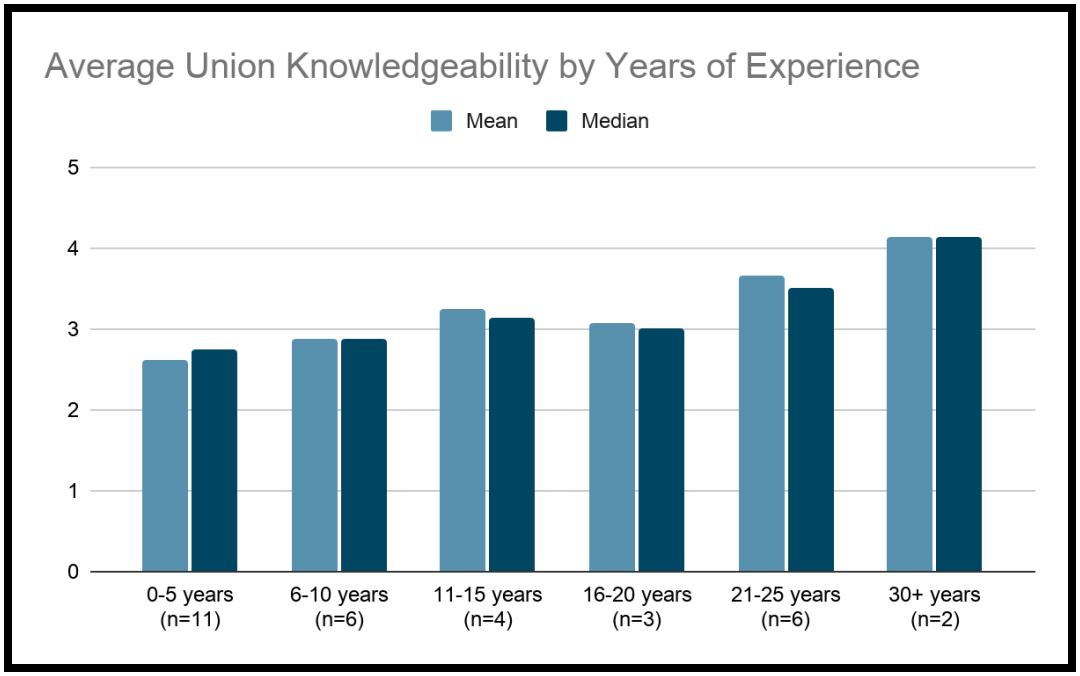
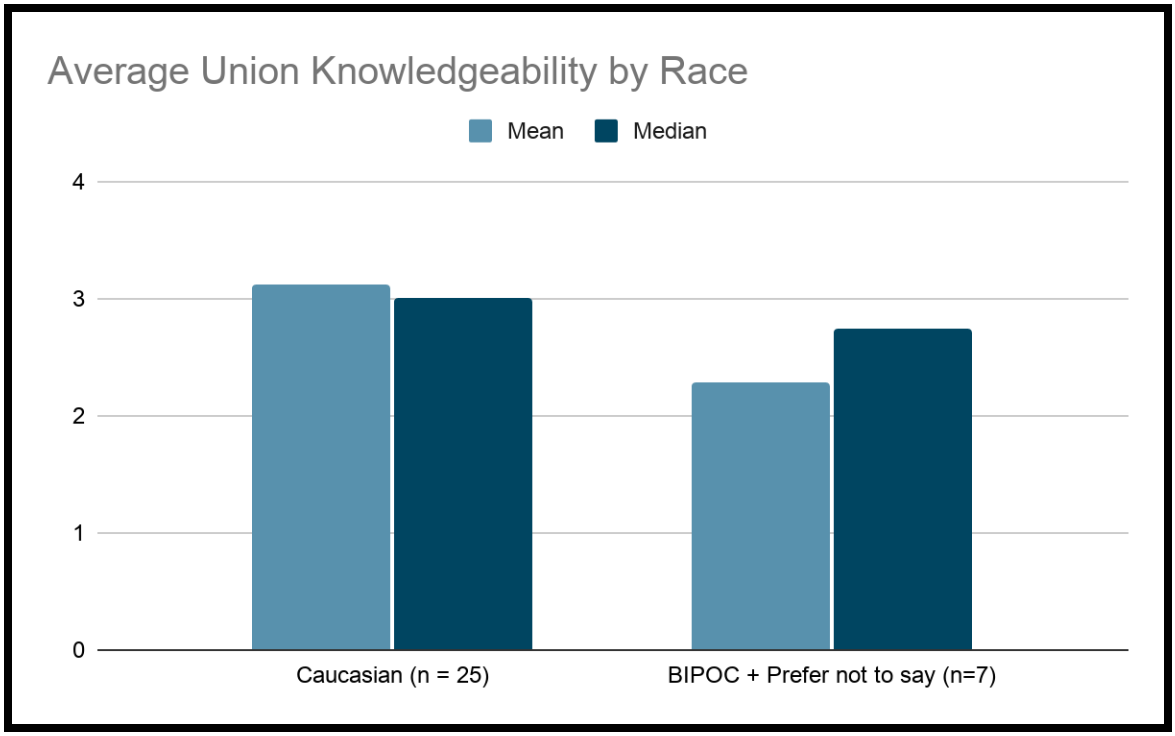


Figure 9

Union Knowledgeability by Race



Union Membership Choice

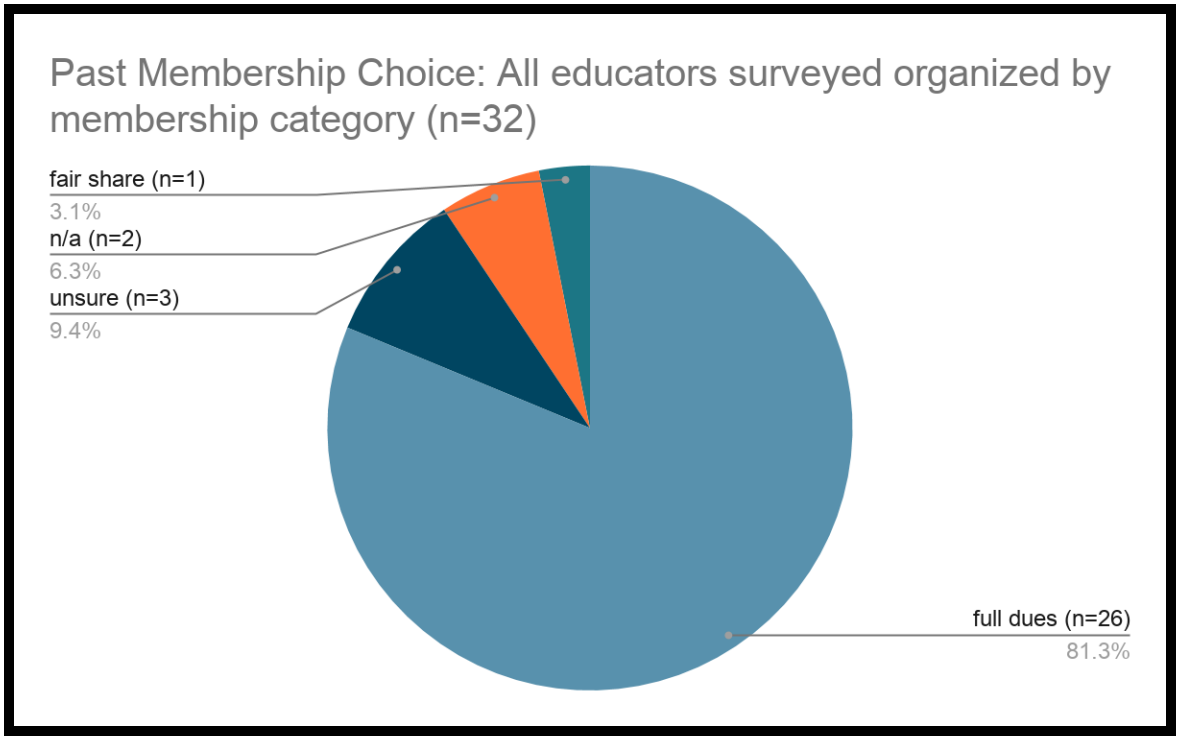
One of the major goals of the survey was to identify whether or not teachers' choices around union membership had changed in light of the *Janus* decision and the new option to "opt out" of the teachers union and no longer pay agency fees. Two questions were designed to capture educators' membership choices, past and present. The first question was: "What level of union membership did you select in past years?" The second question was: "What level of union membership will you select in future years? (NOTE: These options reflect the new Education MN membership choices as of June 2018. Fair share fee payers are now considered non-union members unless they

voluntarily register as a new member of Education MN)" (See Appendix B page 5). In order to identify underlying trends that could be mediating the data, I analyzed respondent's answers to each question across different categories, including years of experience, age, and race. I also tracked those respondents whose answers changed from the first question to the second question, again breaking down participants by years of teaching experience, age, and race.

Whole group. First, I analyzed past membership choices within the whole group of 32 educators surveyed. I found that 81.3% (n=26) paid full union dues in the past. Only one of the 32 educators surveyed (3.1%) indicated that they had paid fair share fees, while three educators (9.4%) were unsure about their past membership and two educators (6.3%) selected "Not applicable because I was not teaching or I was teaching in a district without a union" (see Figure 10).

Figure 10

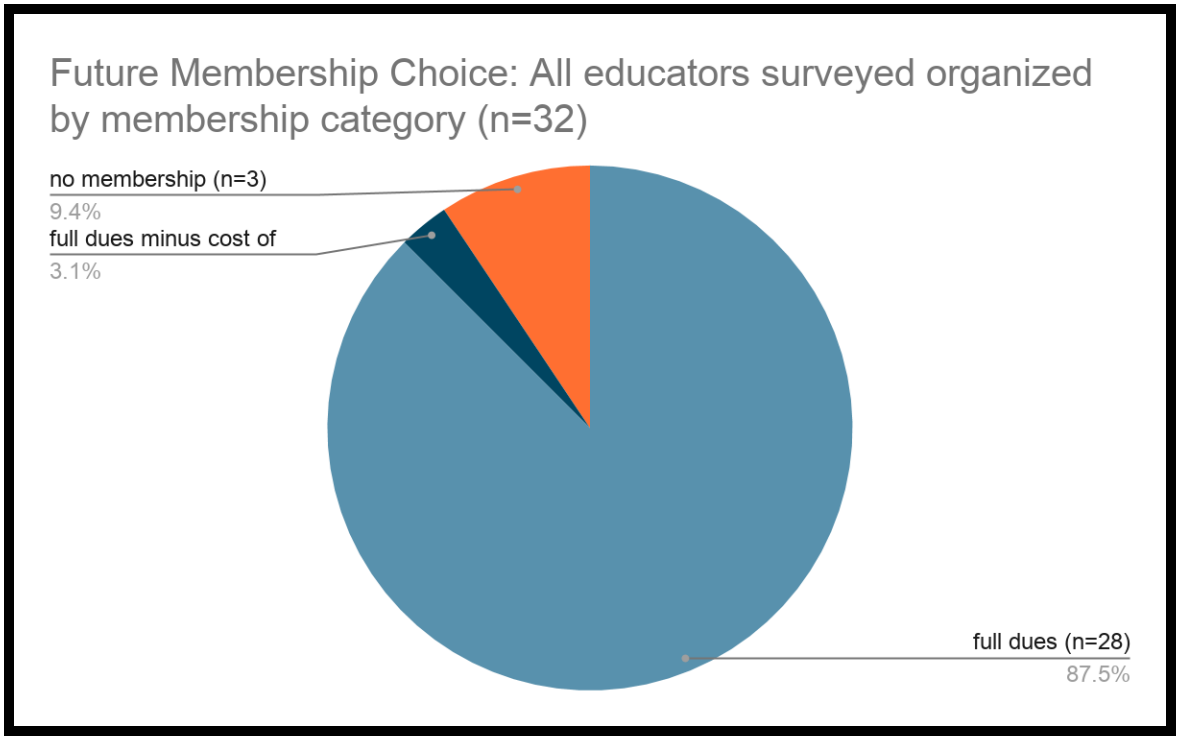
Past Membership: Whole Group



After analyzing past membership choices within the whole group, I looked at future membership choices. I found that 87.5% of the 32 participants surveyed (n=28) indicated that they would pay full union dues in future years, while three educators (9.4%) said they would "opt out" of the union and become non-members. One participant (3.1%) indicated that they would pay full union dues minus the cost of political spending. See Figure 11 below for a graphic representation of the data:

Figure 11

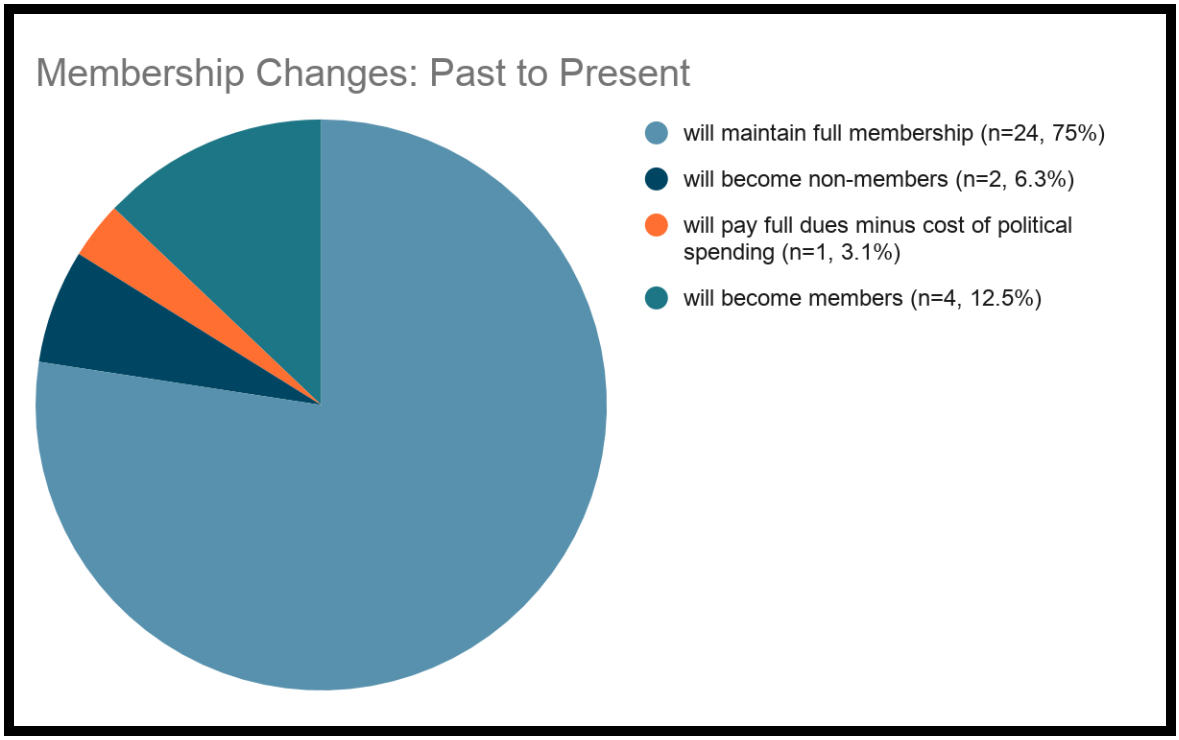
Future Membership: Whole Group



Overall, 21.8% of educators surveyed (n=7) indicated that they would change their membership status going forward. In addition to the one educator who changed from paying full dues to paying full dues minus the cost of political spending, four educators (12.5%) who previously had not paid full union dues or were unsure about their past union status indicated that they would become full dues-paying members of in the future. Also two educators (6.3%), who had either been full dues-paying members in the past or were unsure about their past union status, indicated that they would "opt out" of the union going forward. See Figure 12 below for a graphic representation of the data:

Figure 12

Membership Changes: Past to Present

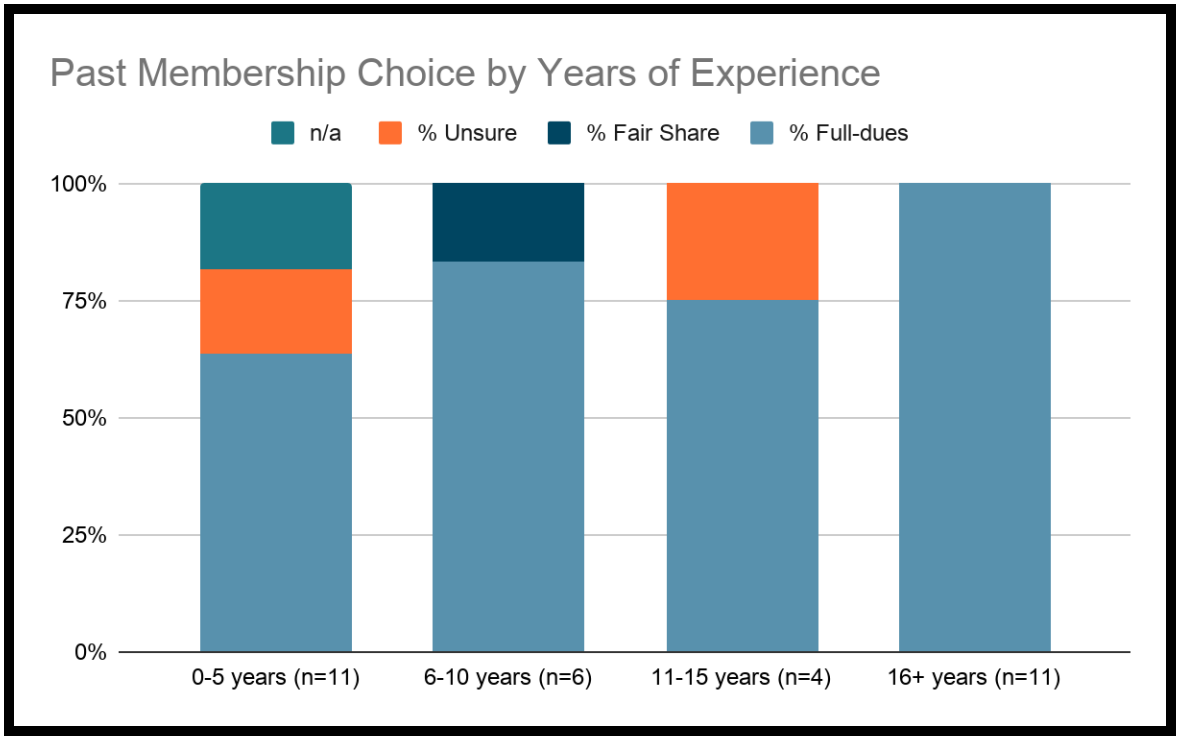


Membership choice by years of experience. After analyzing membership choices within the whole group of educators surveyed, I re-analyzed the data by category, starting with past membership choice by years of experience (see Figure 13 below). Looking at educators with zero to five years of experience (n=11), I found that seven educators (63.6%) chose to pay full union dues in the past, while two educators (18.18%) were unsure about their past union status and two educators indicated that the question was not applicable to them because they either did not teach in the past or taught in a district without a union. Among the educators with six to ten years of experience (n=6), five (83.3%) indicated that they had paid full union dues in the past, while one member

(16.67%) indicated that they had paid fair share fees in the past. Similarly, all but one of the four educators with 11-15 years of experience (75%, n=3) indicated that they had paid full union dues in the past, while the remaining educator (25%) was unsure about their past union status. Interestingly, 100% of the most experienced educators who had taught for sixteen or more years (n=11) indicated that they had paid full union dues in the past.

Figure 13

Past Membership by Years of Experience

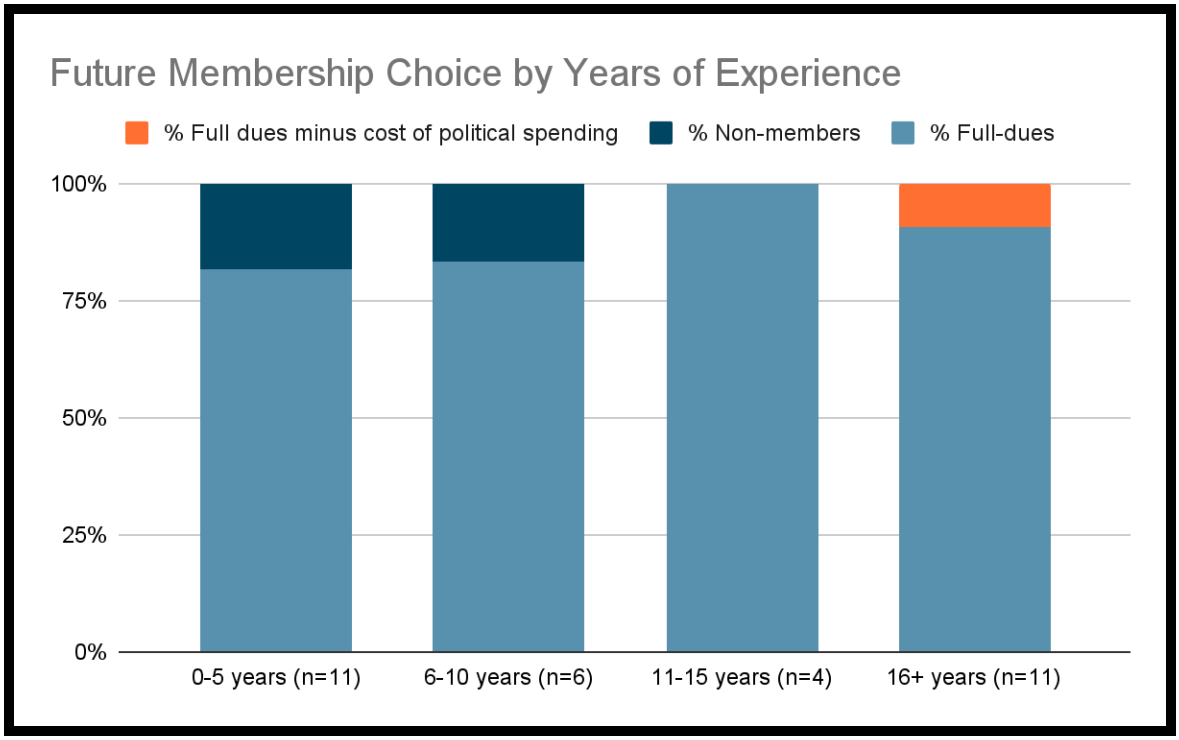


Looking at future union membership by years of experience (see Figure 14 below), I found that within the group of 11 educators with zero to five years of experience, nine of those surveyed (81.8%) indicated that they would pay full union dues going forward, while two individuals (18.2%) indicated that they would become

non-members. Among the six educators with six to ten years of experience, five (83.3%) indicated that they would pay full union dues going forward, while only one (16.7%) said they would become a non-member. All four of the educators with 11-15 years of experience (100%), indicated that they would pay full union dues, while all but one of the 11 educators with 16+ years of experience (n=10, 90.9%) indicated that they would pay full dues. The one remaining educator within this 16+ experience group indicated that they would pay full union dues minus the cost of political spending.

Figure 14

Future Membership by Years of Experience

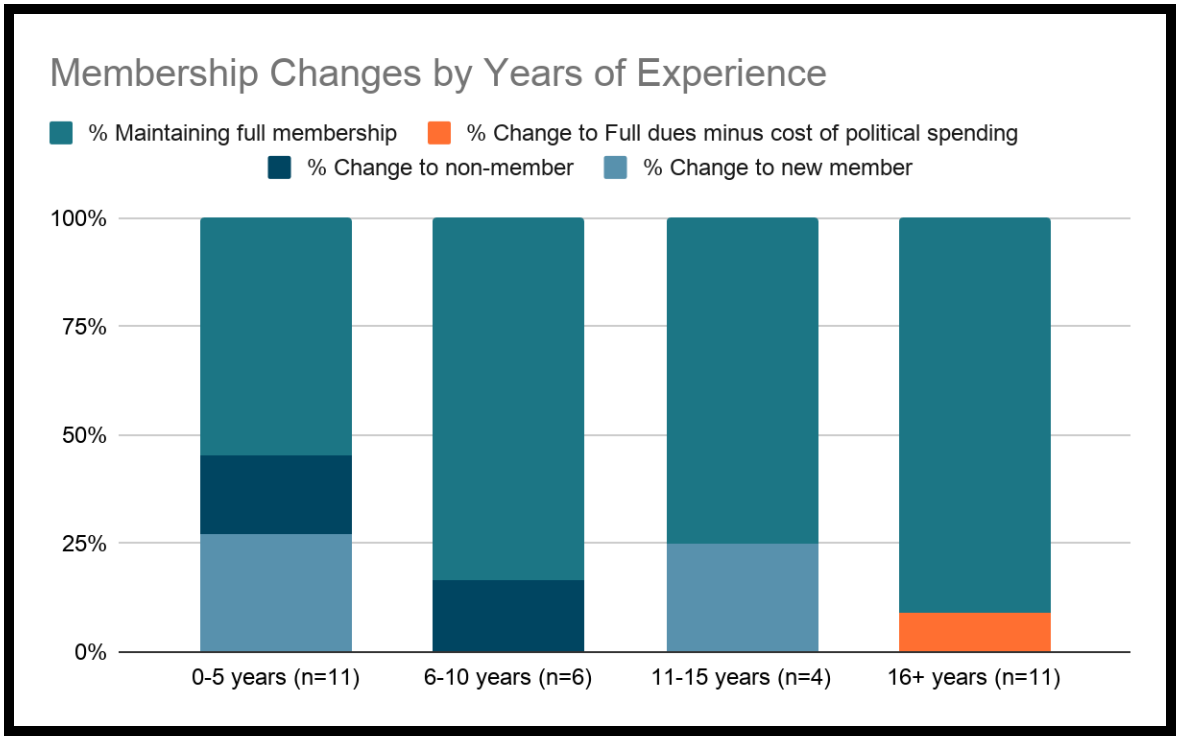


Overall, when it came to changes in membership by years of experience (see Figure 15 below), educators with zero to five years of experience (n=11) shifted the most

significantly, with five educators changing their membership status. Three individuals (27.2%) indicated that they would pay full dues and become new union members going forward, while two individuals (18.2%) indicated that they would become non-members going forward, and the remaining six educators indicated that they would not change their membership status but continue to pay full union dues. For the other groups, there were very few individuals who indicated that they would change their membership status going forward. Among the six educators with six to ten years of experience, only one (16.7%) indicated that they would become a non-member going forward, while the other five (83.3%) indicated that they would maintain full membership status. Similarly, only one of the four educators (25%) within the group who had been teaching for 11-15 years indicated a change in membership status going forward, saying that they would become a new union member and pay full dues, while the other three (75%) said they would maintain their full dues-paying status. Finally, within the group of 11 educators with 16+ years of experience, only one (9.1%) indicated that they would change their membership status going forward, electing to pay full union dues minus the cost of political spending, while the ten other educators (90.9%) indicated that they would continue to pay full union dues and maintain their current status as full members.

Figure 15

Membership Changes by Years of Experience



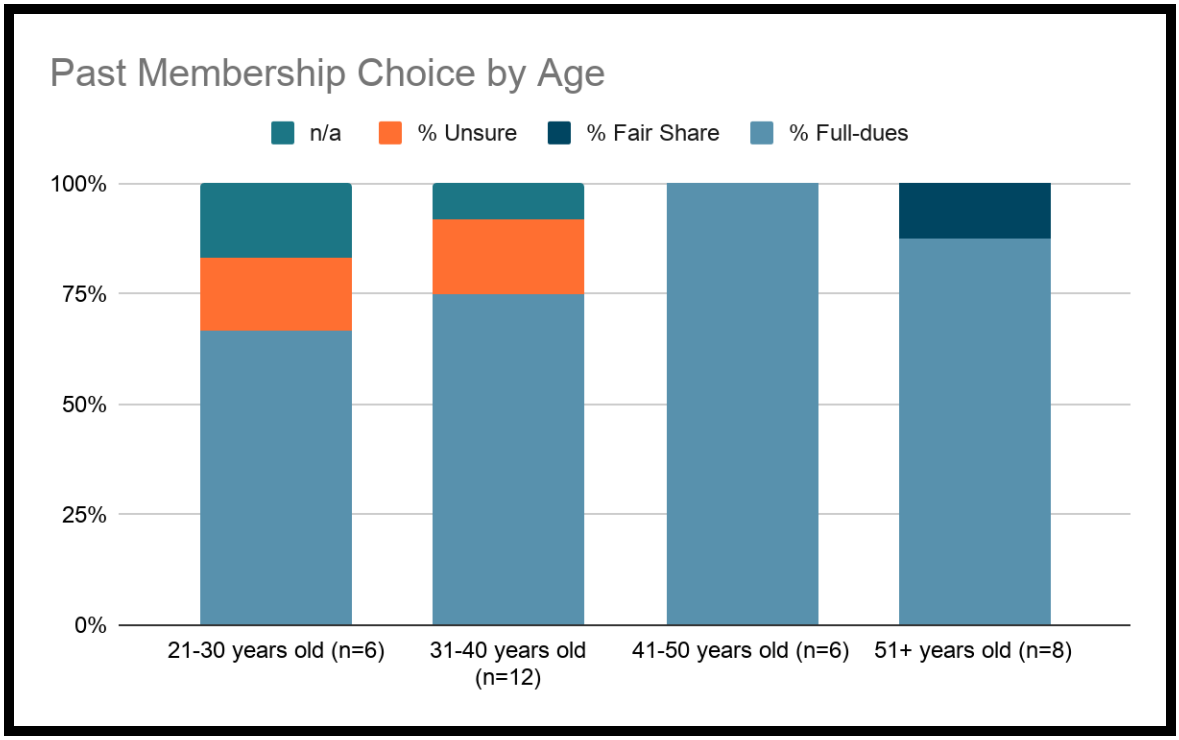
Overall, it appears that the most experienced educators tended to be more likely to pay full union dues, both in the past and future. Less experienced educators were more likely to be unsure about their past union membership, or to have selected "Not applicable because I was not teaching or I was teaching in a district without a union." In addition, less experienced members seemed more likely to become new union members, but also more likely to become non-members in the future.

Membership choice by age. After analyzing past and future membership choices by educators' years of experience, I looked at past membership choices by age group (see Figure 16 below). Among educators surveyed who were 21-30 years old (n=6), four

individuals (66.7%) indicated that they paid full union dues in the past while one educator (16.7%) indicated that they were unsure of their previous membership status and one educator (16.7%) selected “Not applicable because I was not teaching or I was teaching in a district without a union.” Percentages for educators within the next group were not far off. Among the 12 educators age 31-40 years old, nine (75%) indicated that they paid full union dues in the past, while two educators (16.7%) were unsure of their past membership status and one educator (8.3%) selected “Not applicable because I was not teaching or I was teaching in a district without a union.” Among educators age 41-50 years old, however, 100% of those surveyed (n=6) indicated that they had paid full union dues in the past, and 87.5% of the eight educators age 51+ (n=7) indicated that they had previously paid full dues, while one individual (12.5%) indicated that they previously paid fair share fees only.

Figure 16

Past Membership by Age

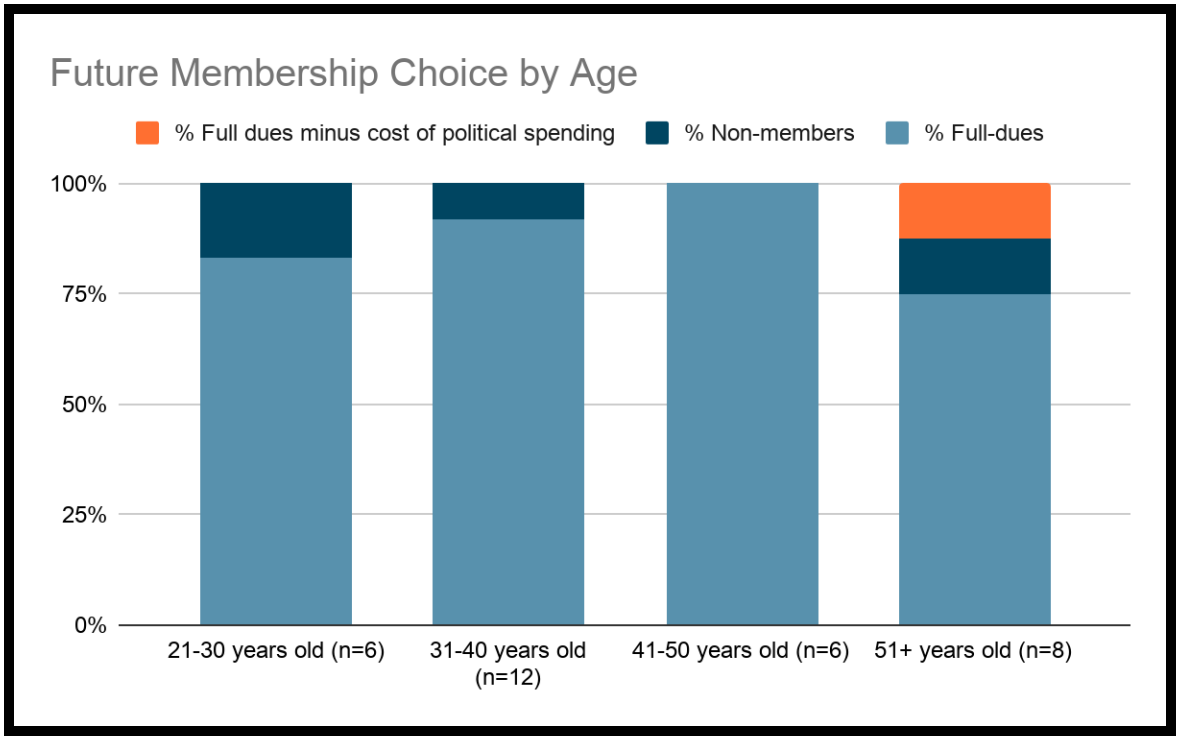


Looking at future membership choice by age, 83.3% (n=5) of the six educators in the 21-30 age group indicated that they would pay full union dues in the future, while one educator (16.7%) indicated that they would become a non-member. In the much larger group of 31-40 year-old educators (n=12), only one individual (8.3%) indicated that they would become a non-member, while the other 11 (91.7%) indicated that they would pay full union dues into the future. 100% of the six educators in the 41-50 year age group indicated that they would also pay full union dues into the future. Within the 51+ year age group, 75% of educators surveyed (n=6) indicated that they would pay full union dues going forward, while one educator (12.5%) indicated that they would become a

non-member and another educator (12.5%) indicated that they would pay full dues minus the cost of political spending. See Figure 17 below for a visual representation of this data:

Figure 17

Future Membership by Age

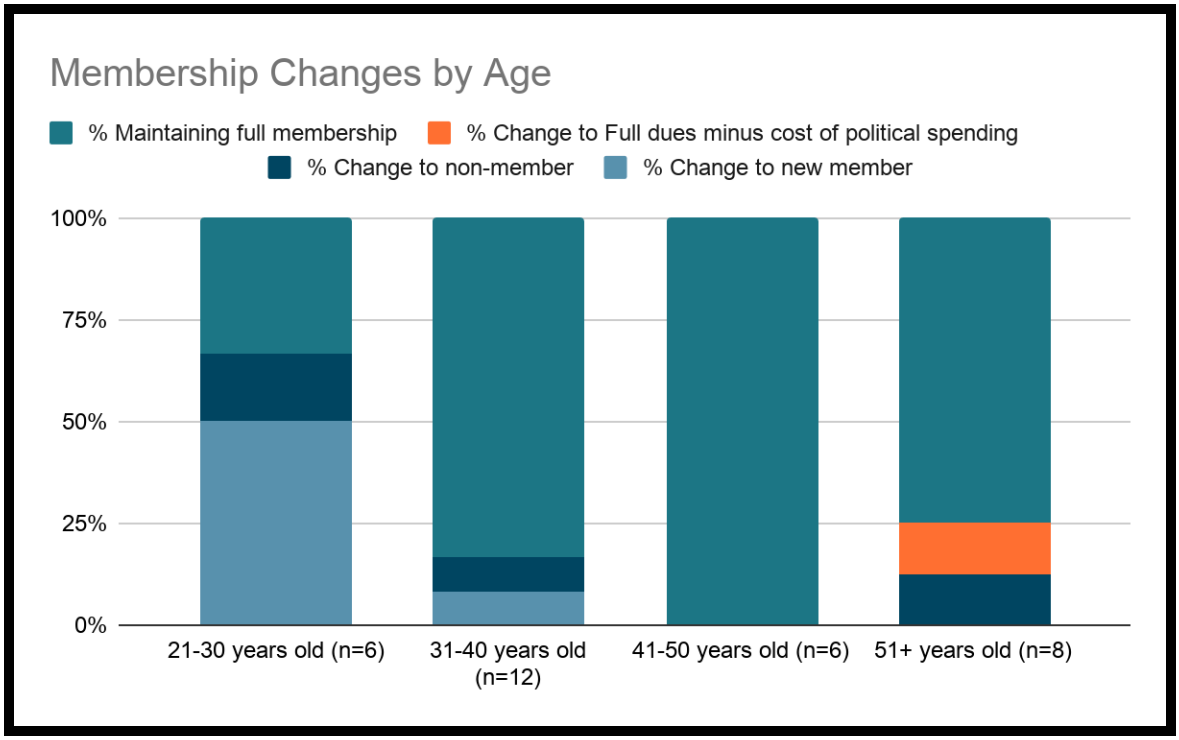


After analyzing overall membership changes by age (see Figure 18 below), it became clear that the youngest educators shifted the most in terms of membership status. 50% of the six educators in the 21-30 year group indicated that they would become new union members, while one educator (16.7%) indicated that they would become a non-member and two educators indicated that they would continue paying union dues and maintain their full membership status. Among the 12 educators in the 31-40 year group, one individual (8.3%) indicated that they would become a new union member while

another individual (8.3%) indicated that they would become a non-member. The remaining ten educators (83.3%) showed no change, indicating that they would continue paying full union dues to maintain their full union membership. All six of the educators in the 41-50 year group indicated that they would not change their full membership status and would continue paying full union dues. Among the eight educators in the 51+ year age group, only two individuals indicated that they would somehow change their membership status going forward, with one individual (12.5%) indicating that they would become a non-member and another individual (12.5%) indicating that they would pay full union dues minus the cost of political spending. The remaining six educators within the group indicated that they would maintain their full membership status and continue paying full union dues.

Figure 18

Membership Changes by Age



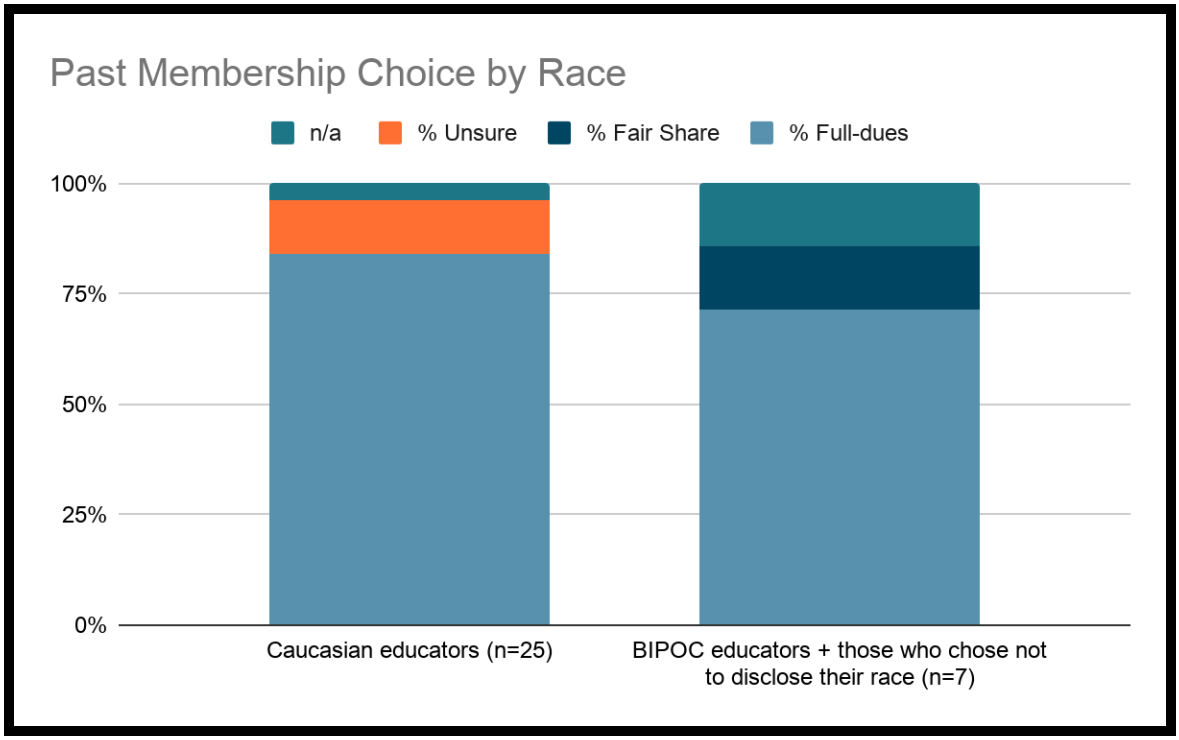
Overall, it appears that educators within the youngest age group (21-30 years old) were the most likely to become both new members and non-members. Educators within the two youngest age groups were also the only groups wherein educators indicated they were unsure of their past union status, or selected "Not applicable because I was not teaching or I was teaching in a district without a union." It is harder to draw overall conclusions about older educators because trends were not consistent. The widely differing numbers within age groups also make it difficult to identify any definitive trends in the data.

Membership choice by race. After analyzing educators' past and future membership choices by age, I looked at past membership choices by race. I decided to

look only at two subgroups: educators who identified as Caucasian and educators who identified as BIPOC or selected “I prefer not to say.” I could have chosen to break the second group down further into smaller subgroups by race category, but the numbers within each of these subgroups were oftentimes very small, which would have made it more difficult to identify larger trends in the data. First, I looked at past membership status by race (see Figure 19 below). Among educators who identified as Caucasian (n=25), 84% (n=21) indicated that they paid full union dues in the past, while 12% (n=3) were unsure about their past union status, and one individual (4%) selected “Not applicable because I was not teaching or I was teaching in a district without a union.” Among the seven educators who either identified as BIPOC or chose not to disclose their race, five (71.4%) indicated that they paid full union dues in the past, while one individual (14.3%) indicated that they paid only fair share fees in the past and another individual (14.3%) selected “Not applicable because I was not teaching or I was teaching in a district without a union.”

Figure 19

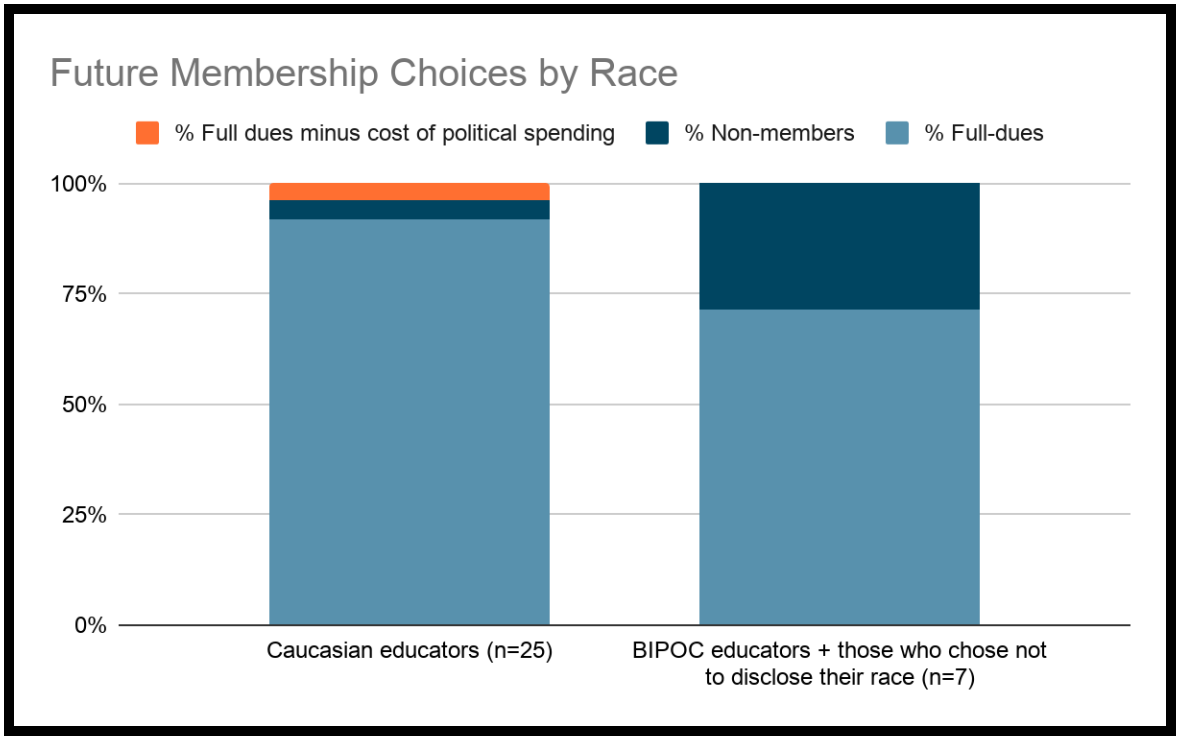
Past Membership by Race



When I analyzed educators' future membership choices by race (see Figure 20 below), I found that among the 25 Caucasian educators surveyed, 92% (n=23) indicated that they would pay full union dues into the future, while one individual (4%) indicated that they would become a non-member and another individual (4%) indicated that they would pay full dues minus the cost of political spending in the future. Among BIPOC educators and those who chose not to disclose their race (n=7), 71.4% (n=5) indicated that they would pay full union dues into the future, while two individuals (28.6%) indicated that they would become non-members.

Figure 20

Future Membership by Race

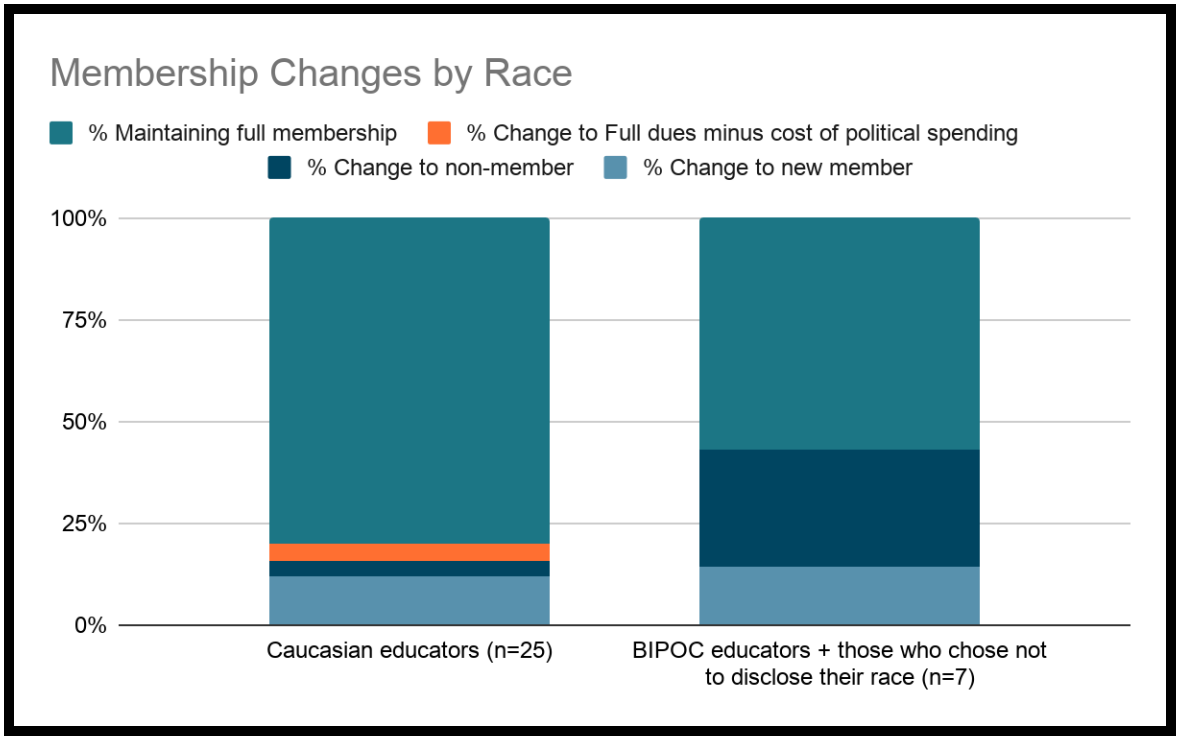


After examining the overall changes in educators' union membership choices by race, I found that among those educators who identified as Caucasian (n=25), three individuals (12%) chose to become new union members, while one individual (4%) chose to become a non-member, and another individual (4%) chose to pay full dues minus the cost of political spending. The remaining 20 educators chose not to change their full membership status, and said they would continue paying full union dues into the future. Among BIPOC educators and those who chose not to disclose their race (n=7), only one individual (14.3%) chose to become a new union member, while two educators (28.6%) chose to become non-members. The other four educators (57.1%) said they would not

change their full union membership, and would continue paying full union dues. See Figure 21 below for a graphic representation of the data:

Figure 21

Membership Changes by Race



Overall, it is clear that educators who identified as Caucasian were, by percentage, slightly more likely both to have been full dues-paying union members in the past and more likely to maintain full membership status into the future. Caucasian educators were also the only group wherein an individual chose to pay full union dues minus the cost of political spending in the future, and the only group wherein individuals indicated that they were unsure of their past union status. In contrast, educators who identified either as BIPOC or chose not to disclose their race were the only group

wherein an individual indicated that they paid fair share fees in the past. This group was also, by percentage, more likely to become non-members into the future, as well as more likely to become new members into the future, but only very slightly. Whether or not these same trends would hold within a larger sample size is hard to predict. Once again, the widely differing numbers within groups, as well as the very small sample size in general, make it difficult to identify any definitive trends in the data.

Union Engagement

The next two sections of the survey were focused on participants' past and present union engagement. Section five asked respondents to rate their level of attendance at six different types of union events in the past, including union social events, building union meetings, local union general membership meetings, Education Minnesota sponsored professional development opportunities, union-related political activities, and union leadership and governing events. Section five also asked respondents to indicate whether or not they had ever held any union leadership positions. Similarly, section six asked participants to indicate how often they planned to attend the same list of events in the future. (See Survey Instrument in Appendix B pages 5 and 6).

In order to analyze educators' responses within these two sections, I decided to assign the possible answers to each question about attendance at union events a value on a Likert scale from zero to two. For each response beginning with: "I have attended zero [union events]," or "I plan to attend zero [union events]," I assigned a value of zero. For each response beginning with: "I have attended some [union events]," or "I plan to attend some [union events]," I assigned a value of one. For each response beginning with: "I

have attended many [union events]," or "I plan to attend many [union events]," I assigned a value of two. Assigning values to different answer choices made it possible for me to calculate average past and future engagement scores for each individual, as well as to track average engagement scores across different subgroups. If participants had not previously been teachers, had taught in a district without a union, or planned to stop teaching in a district with a union in the future, they were directed to select the response beginning with "Not applicable…." These responses were not assigned a value and therefore not factored into overall engagement calculations. Also, within the future union engagement section, there was also an option for participants to choose "I am not sure." For participants who chose this option, I did not assign a value but calculated the number of "unsure" responses separately.

Past engagement. First, I calculated each participant's past union engagement average by adding up their scores across the first six questions in the section and dividing them by six. Then, I calculated past engagement averages for the whole group and different subgroups by adding each individual's past engagement average and dividing the sum by the number of participants in the group. Within the large group, two educators selected responses beginning with "Not applicable…" for all questions, so only 30 of the 32 participants were factored into the group average. Of those 30 educators, I calculated an average past union engagement score of 0.49 out of 2.0. Breaking down that average question by question, I found the following average engagement scores (See Table 1 below):

Table 1

Average Past Union Engagement: Whole Group

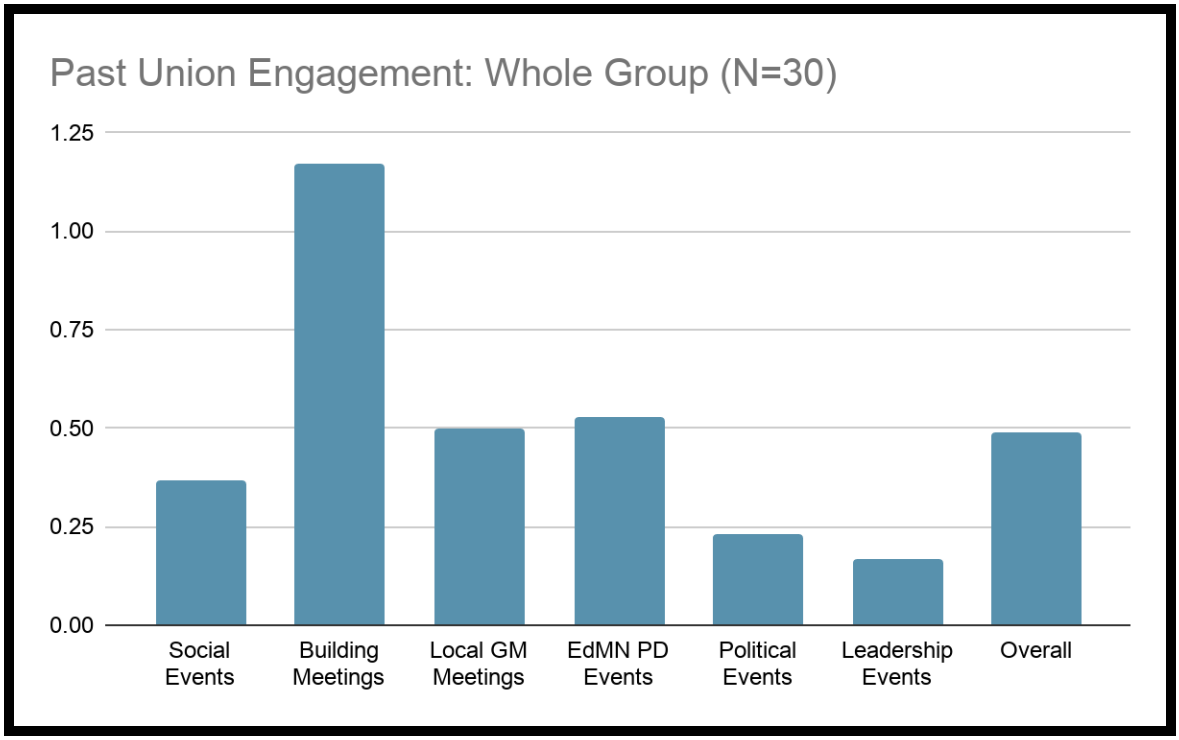
Question	Average Engagement Score (0-2)
How would you describe your level of attendance at **union social events** (e.g. WhirlyBall, Contract Settlement party, Saints game, etc.)?	0.37
How would you describe your level of attendance at **building union meetings** in the past?	1.17
How would you describe your level of attendance at **local union general membership meetings** in the past?	0.5
How would you describe your level of attendance at **Education Minnesota sponsored professional development opportunities** (e.g. MEA Conference, EdMN Summer Seminar, etc.) in the past?	0.53
How would you describe your level of attendance at **union-related political activities** (e.g. Fall political conference, PAC meetings, Lobby days, etc.) in the past?	0.23
How would you describe your level of attendance at **union leadership and governing events** (e.g. The Education MN Representative Convention, standing committee meetings, Early Career Leadership Fellows program, etc.) in the past?	0.17

After analyzing the engagement scores for each question, it became clear that certain union events tended to draw more participation than others . With an average past engagement score of 1.17, respondents were by far the most likely to have attended a building union meeting than any other union event. Education Minnesota sponsored professional development opportunities (score=0.53) and local union general membership meetings (score=0.5) were also among the top most attended union events. In contrast, the three least attended union events were union social events (score=0.37), union-related

political activities (score=0.23), and union leadership and governing events (score=0.17). See Figure 22 below for a visual representation of the data:

Figure 22

Past Union Engagement: Whole Group

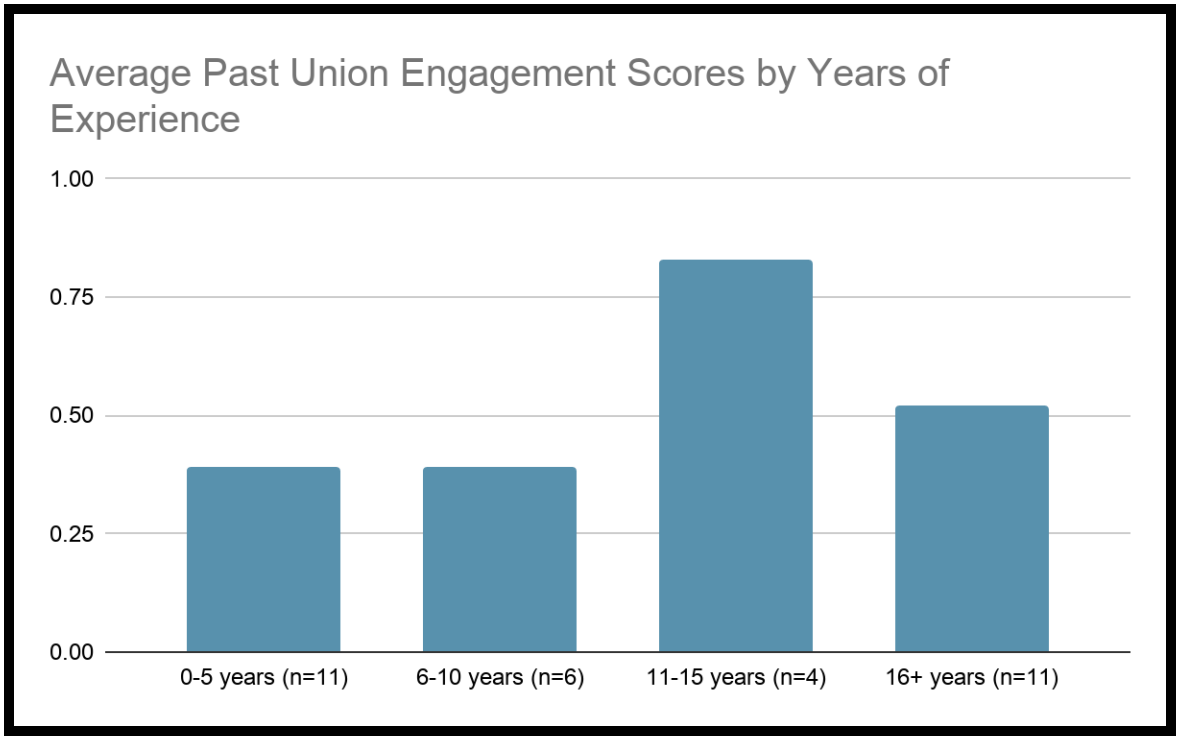


Next, I calculated average past union engagement by years of experience (see Figure 23 below). I chose to focus only on the overall engagement total for each subgroup, since breaking down each group's scores question by question would have been too time- and labor-intensive. Overall, I found that the two newest groups of educators had the lowest average past union engagement scores. For both educators with zero to five years of experience (n=11) and educators with six to ten years of experience (n=6), the average past union engagement score was 0.39. The group with the highest

overall average past union engagement score was educators with 11-15 years of experience (n=4), with a score of 0.83, and educators with 16+ years of experience (n=11) had a past union engagement score of 0.52.

Figure 23

Past Union Engagement by Years of Experience

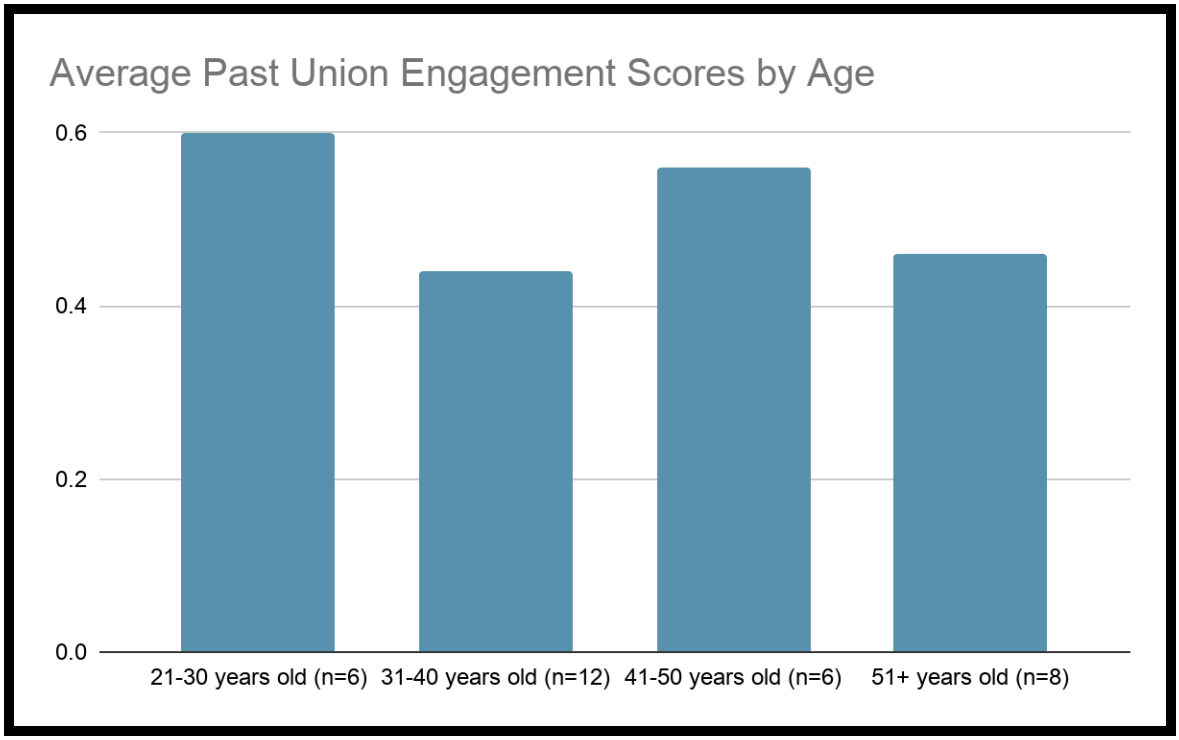


After looking at past union engagement scores by years of experience, I then analyzed past engagement scores by educator age (see Figure 24 below). I was somewhat surprised to find that educators aged 21-30 years old (n=6) did not have the lowest engagement averages. With a score of 0.6, 21-30 year-olds in fact had the highest past union engagement averages of the entire group. The next highest group was educators age 41-50 years old (n=6), with an average past union engagement score of 0.56. The two

groups with the lowest past union engagement scores were educators age 51 + years old (n=8) with a score of 0.46, and educators age 31-40 years old (n=12), with a score of 0.44. With no clear pattern emerging around past union engagement and educator age, it is difficult to understand what exactly is driving the differences between age groups.

Figure 24

Past Union Engagement by Age

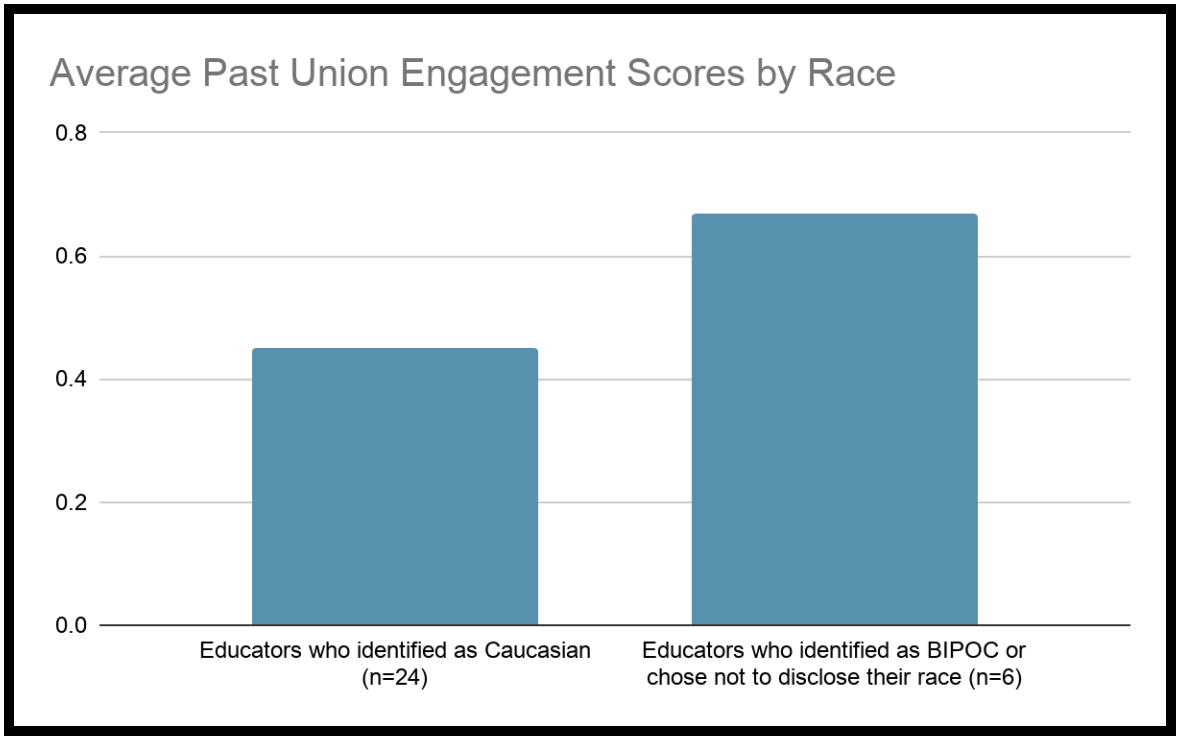


The final category of past union engagement I chose to analyze was race. I found that overall, educators who identified as Caucasian (n=24) scored 0.45, while educators who identified as BIPOC and those who chose not to disclose their race (n=6) scored 0.67. This was a rather striking difference that left me with many new questions. While it is tempting to try to draw conclusions about what may be driving the difference, it is also

important to acknowledge that the differences in group size were significant, and with such a small group of participants who either identified BIPOC or chose not to disclose their race, it is hard to know whether or not similar results would have been replicated on a larger scale. See Figure 25 below for a visual representation of the data:

Figure 25

Past Union Engagement by Race



The final question in the survey section on past union engagement was: “Have you ever held any union leadership positions (e.g. building rep, executive board member, committee member, etc.)?” Of the 32 participants surveyed, six answered “Yes” (18.8%), while 26 (81.3%) answered “No,” (see Figure 26 below). Overall, results show that, in general, the older and more experienced educators were, the more likely they were to

have held a union leadership position in the past. There was one exception to this rule: a higher percentage of educators with 11-15 years of experience (50%, n=2) held union leadership positions than did educators with 16+ years of experience (37.5%, n=3). Looking solely at numbers, more educators who identified as Caucasian said they had held a union leadership position in the past (n=4) than did educators who identified as BIPOC or chose not to disclose their race (n=2). However, as a percentage of their racial category, more educators who identified as BIPOC or chose not to disclose their race reported having previously held a union leadership position (28.57%, n=2 out of 7) than did educators who identified as caucasian (16%, n=4 out of 25). For a specific breakdown of the data, see Table 2.

Figure 26

Union Leadership Positions

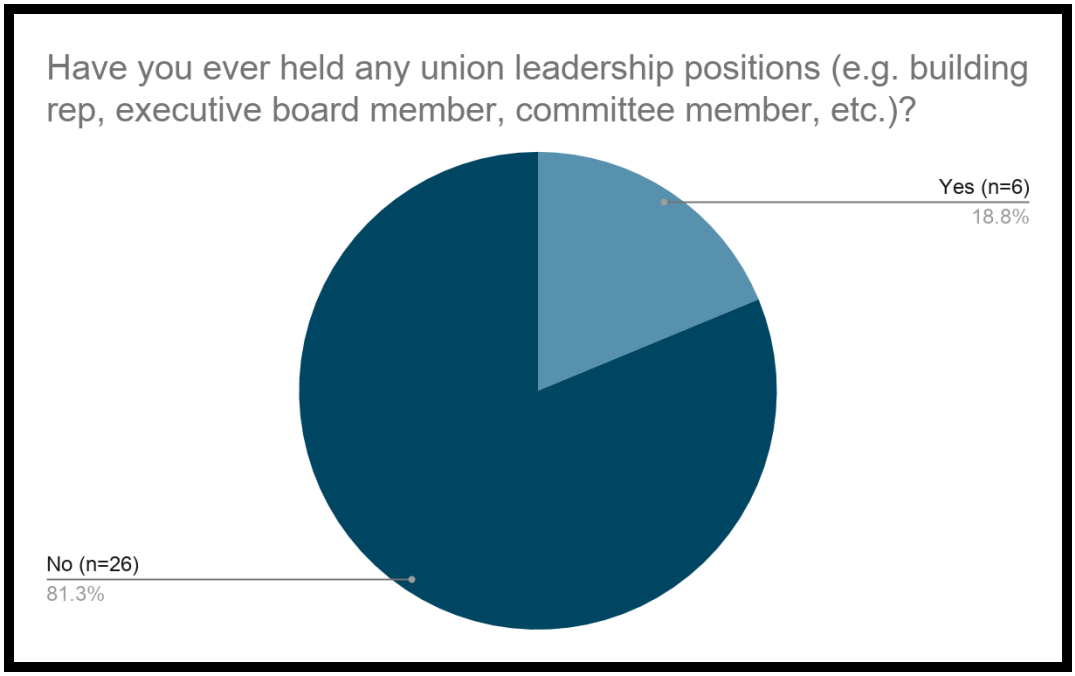


Table 2

Educators Who Have Held Union Leadership Positions

Educator Group	Number of union leaders	% of all union leaders	% of group
By Years of Experience			
Educators with 0-5 years of experience (n=11)	0	0%	0%
Educators with 6-10 years of experience (n=6)	1	16.7%	16.7%
Educators with 11-15 years of experience (n=4)	2	33.3%	50%
Educators with 16+ years of experience (n=11)	3	50%	27.3%
By Age			
21-30 years old (n=6)	0	0%	0%
31-40 years old (n=12)	2	33.3%	16.7%
41-50 years old (n=6)	1	16.7%	16.7%
51+ years old (n=8)	3	50%	37.5%
By Race			
Educators who identified as Caucasian (n=25)	4	66.7%	16%
Educators who identified as BIPOC or chose not to disclose their race (n=7)	2	33.3%	28.6%

Future engagement. After switching gears and focusing on the next section of the survey, which was on future union engagement, I again calculated each participant's future union engagement averages by adding up their scores across the six questions in the section and dividing them by six. The one change in this section was that participants were also given the option to select "I am not sure" when they were unable to choose a

more accurate estimation of their future engagement at a certain type of union event, so I had to calculate participants' future union engagement averages slightly differently in this situation. When I saw an "I am not sure" response, I chose to factor that response out of the calculations and divide the participants' total engagement number by the number of questions that contributed an actual score. Then, I calculated future engagement averages for the whole group and different subgroups by adding each individual's future engagement average and dividing the sum by the number of participants in the group. Within the large group, one educator selected responses beginning with "Not applicable…" for all questions, so only 31 of the 32 participants were factored into the group average. Of those 31 educators, I calculated an average future union engagement score of 0.76 out of 2.0, which increased by 0.27 from 0.49, which was the overall past union engagement average. See Table 3 below for a question-by-question breakdown of future union engagement averages, as well as a comparison with corresponding past engagement scores:

Table 3

Future Union Engagement: Whole Group

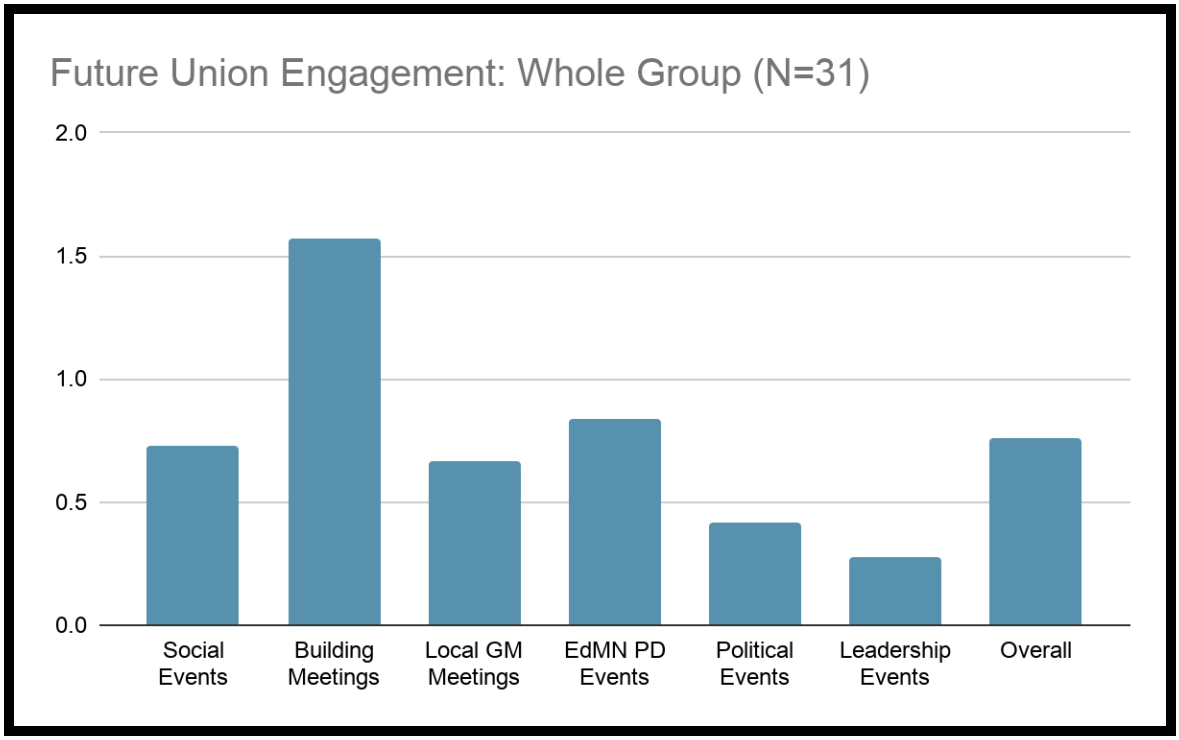
Question	Average Engagement Score (0-2)	Change from Past Engagement Score (0-2)
How often do you plan to attend **union social events** (e.g. WhirlyBall, Contract Settlement party, Saints game, etc.) in the future?	0.73	+0.36
How often do you plan to attend **building union meetings** in the future?	1.57	+0.40
How often do you plan to attend **local union general membership meetings** in the future?	0.67	+0.17
How often do you plan to attend **Education Minnesota sponsored professional development opportunities** (e.g. MEA Conference, EdMN Summer Seminar, etc.) in the future?	0.84	+0.31
How often do you plan to attend **union-related political activities** (e.g. Fall political conference, PAC meetings, Lobby days, etc.) in the future?	0.42	+0.19
How often do you plan to attend **union leadership/governing events** (e.g. The Education MN Representative Convention, standing committee meetings, Early Career Leadership Fellows program, etc.) in the future?	0.28	+0.11

I found that educators' average future engagement scores increased in relation to their corresponding past engagement scores for each of the six questions. Union events showing the largest increases between past and future engagement scores were building union meetings, which added 0.40 to their original score, union social events, which added 0.36 to their original score, and Education Minnesota sponsored professional

development opportunities, which added 0.31 to their original score. These increases were somewhat in line with the three highest future union engagement scores. With an average future engagement score of 1.57, respondents were again the most likely to attend a building union meeting than any other union event. Education Minnesota sponsored professional development opportunities (score =0.84) were the second-highest scoring union events, followed by union social events (score =0.73), which jumped into the top three future engagement scores from the fourth highest past engagement position, switching places with local union general membership meetings (score =0.67). Again, the two union events with the lowest future engagement scores were union-related political activities, with a score of 0.42, and union leadership/governing events, with a score of 0.28. See Figure 27 below for a visual representation of the data:

Figure 27

Future Union Engagement: Whole Group

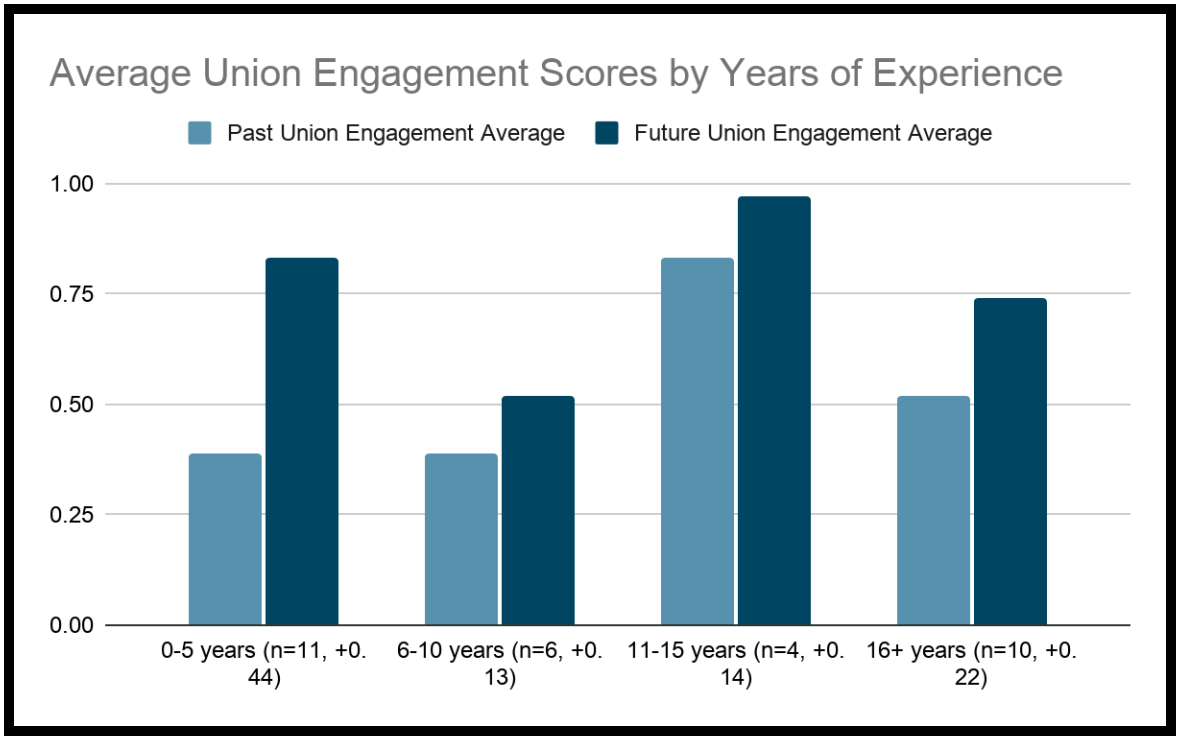


After calculating future union engagement averages for the whole group of survey respondents, I calculated future union engagement averages by category. I started by calculating future union engagement by years of experience. Again, I chose to focus only on the overall engagement total for each subgroup, and that provided a more productive analysis than focusing on the micro-level. After comparing future union engagement averages to the past union engagement averages recorded for the same groups, it is clear that engagement for each group increased by at least 0.13. However, some groups increased more than others. While educators with 11-15 years of experience (n=4) remained the group with the highest future engagement average, with an average score of

0.97, the group with the next highest engagement average changed from educators with 16+ years of experience to educators with 0-5 years of experience (n=11), with an average future union engagement score of 0.52. Previously, two groups were tied with the lowest past union engagement averages: educators with zero to five years of experience and educators with six to ten years of experience. Looking at future union engagement averages, however, the two groups with the lowest future union engagement averages were educators with 16+ years of experience (n=10), with an average score of 0.74, and educators with 6-10 years of experience (n=6), with an average score of 0.52. See Figure 28 below for a visual representation of how group engagement data shifted from the past union engagement section to the future union engagement section:

Figure 28

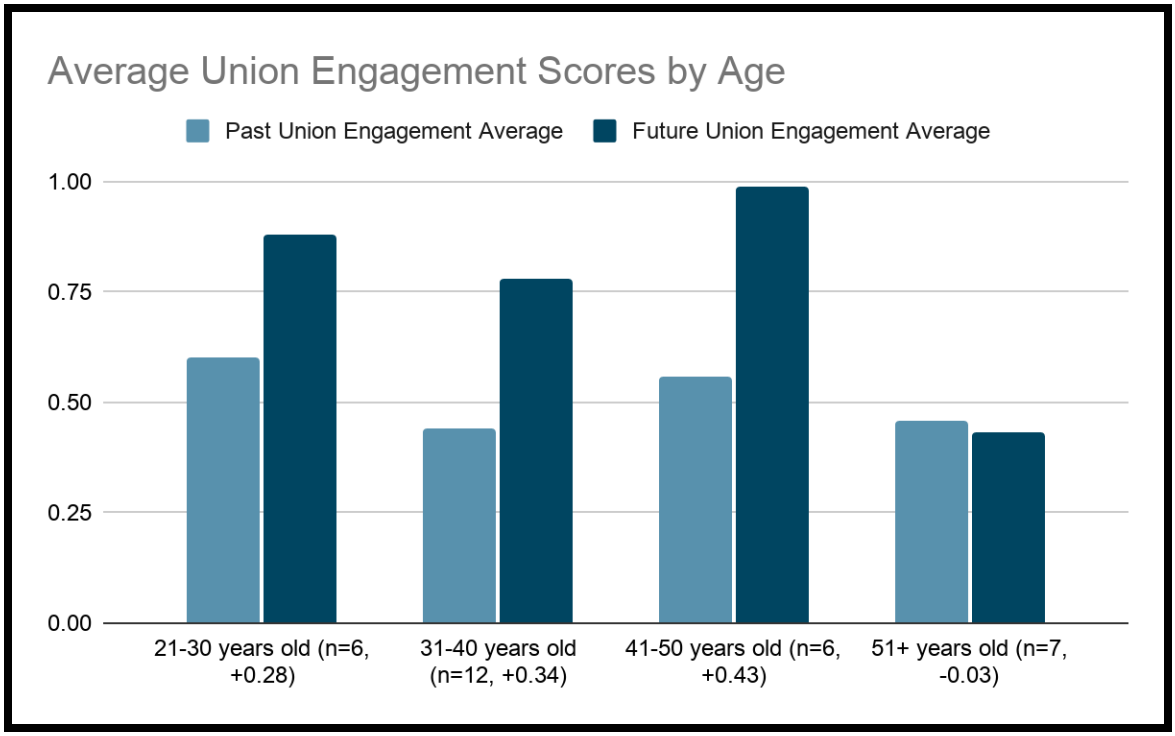
Union Engagement by Years of Experience



Next, I calculated future union engagement averages by educator age. After comparing future engagement data with past union engagement data, I found that each group's future engagement average went up with the exception of one group: educators age 51+ (n=7). While previously, the group with the lowest past union engagement average had been 31-40 year olds, engagement among educators 51+ years old actually decreased by 0.03, making them the group with lowest future union engagement average, with a score of 0.43. The group with the next lowest future union engagement average was 31-40 year olds (n= 12), with a score of 0.78. The groups with the highest engagement averages also shifted somewhat from the past engagement section to the future engagement section, with 41-50 year olds (n=6, score= 0.99) pushing 21-30 year olds (n=6, score= 0.88) from the top highest position down to the second highest position. See Figure 29 below for a visual representation of how group engagement data shifted from the past union engagement section to the future union engagement section:

Figure 29

Union Engagement by Age

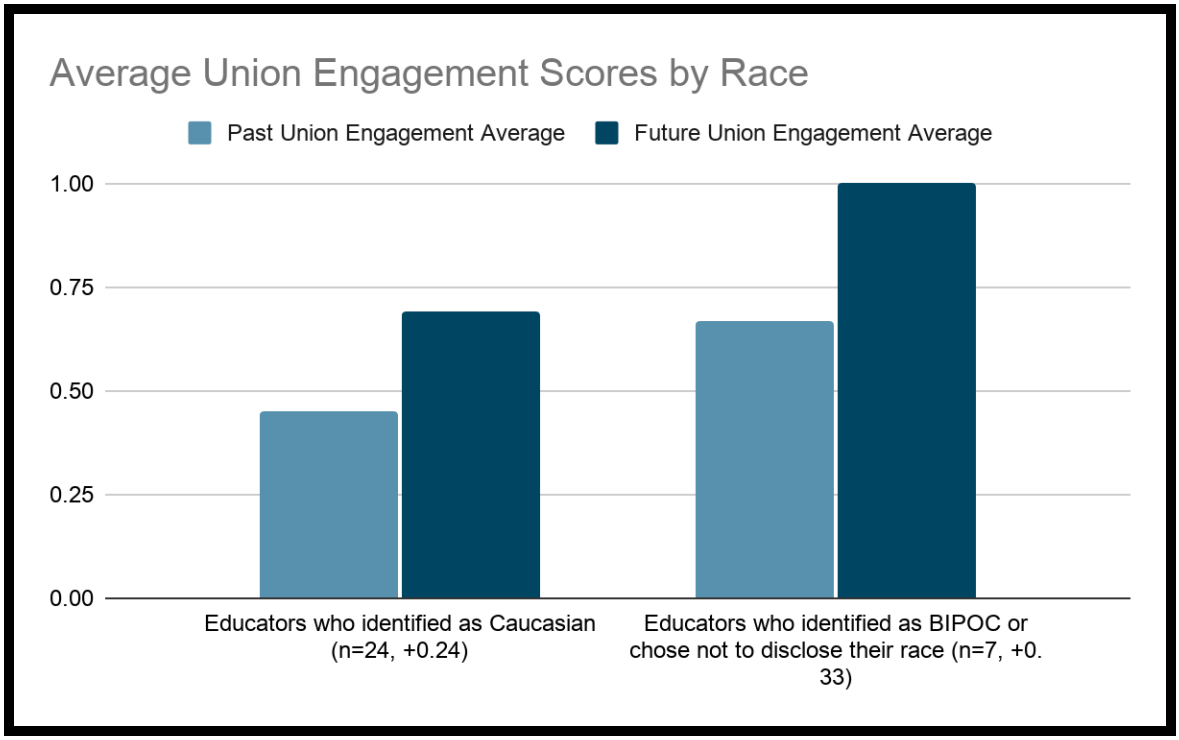


After calculating and comparing educators' past and future union engagement averages by age, I then focused on race. I found that for both groups of educators surveyed, union engagement averages went up from the past engagement section to the future engagement section. As with past union engagement scores, educators who either identified as BIPOC or chose not to disclose their race showed the highest future union engagement averages, with a score of 1.00. Among educators who identified as Caucasian, the future union engagement average was 0.69. Once again, it is difficult to know whether or not the differences in scores between these two groups are significant due to the fact that the group of educators who either identified as BIPOC or chose not to

disclose race was so small. See Figure 30 below for a visual representation of how group engagement data shifted from the past union engagement section to the future union engagement section:

Figure 30

Union Engagement by Race

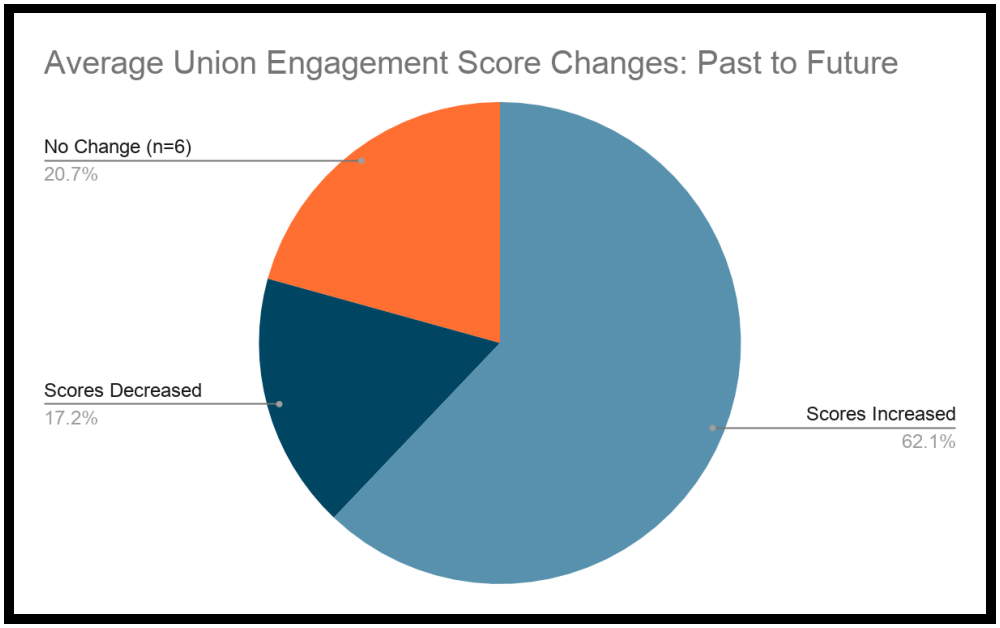


To close out the union engagement section, I looked specifically at changes in union engagement from past to present. First, I went back to the large group of survey respondents and identified the 29 individuals who gave legitimate responses (not N/A responses) within both sections. I then recorded whether each individual's union engagement average increased, decreased, or remained the same from the past engagement section to the future engagement section. After that, I analyzed the data by

category. Overall, I found that 62.1% (n=18) of the 29 respondents' union engagement scores increased, while 17.2% (n=5) of union engagement scores decreased and 20.7% (n=6) did not change (See Figure 31 below):

Figure 31

Union Engagement Changes: Past to Future



Looking at average union engagement score changes by years of experience, data shows that both educators with zero to five years of experience and educators with six to ten years of experience were the most likely to increase their union engagement from the past engagement section to the future engagement section, while educators with 16+ years of experiences were the most likely to decrease their engagement, and educators with zero to five years of experience were the most likely to show no change in engagement level. Looking at average engagement score changes by educator age, it

appears that educators age 41-50 years old were the most likely to show an increase in their union engagement from the past engagement section to the future engagement section, while educators age 51+ years old were the most likely to decrease their union engagement, as well as the most likely to show no change in engagement. Looking at engagement changes by race, Caucasian educators were the most likely to show an increase in engagement from the past engagement section to the future engagement section, as well as the most likely to show a decrease in engagement. Educators who identified either as BIPOC or chose not to disclose their race were the most likely to show no change in engagement level from the past engagement section of the survey to the future engagement section. Specific union engagement score changes by category are summarized in Table 4 below:

Table 4

Average Union Engagement Changes: Past to Future

Educator Group	% increase	% decrease	% Showing No Change
By Years of Experience			
Educators with 0-5 years of experience (N=9)	67% (N=6)	0% (N=0)	33% (N=3)
Educators with 6-10 years of experience (N=6)	67% (N=4)	17% (N=1)	17% (N=1)
Educators with 11-15 years of experience (N=4)	50% (N=2)	25% (N=1)	25% (N=1)
Educators with 16+ years of experience (N=10)	60% (N=6)	30% (N=3)	10% (N=1)
By Age			
21-30 years old (N=5)	80% (N=4)	0% (N=0)	20% (N=1)
31-40 years old (N=11)	64% (N=)	18% (N=2)	18% (N=2)
41-50 years old (N=6)	100% (N=6)	0% (N=0)	0% (N=0)
51+ years old (N=7)	14% (N=1)	43% (N=3)	43% (N=3)
By Race:			
Educators who identified as Caucasian (N=23)	65% (N=15)	22% (N=5)	13% (N=3)
Educators who identified as BIPOC or chose not to disclose their race (N=6)	50% (N=3)	0% (N=0)	50% (N=3)

Barriers to Union Membership and Engagement

The next section of the survey was designed to capture a variety of different pieces of information from respondents, most of which were related to barriers that might

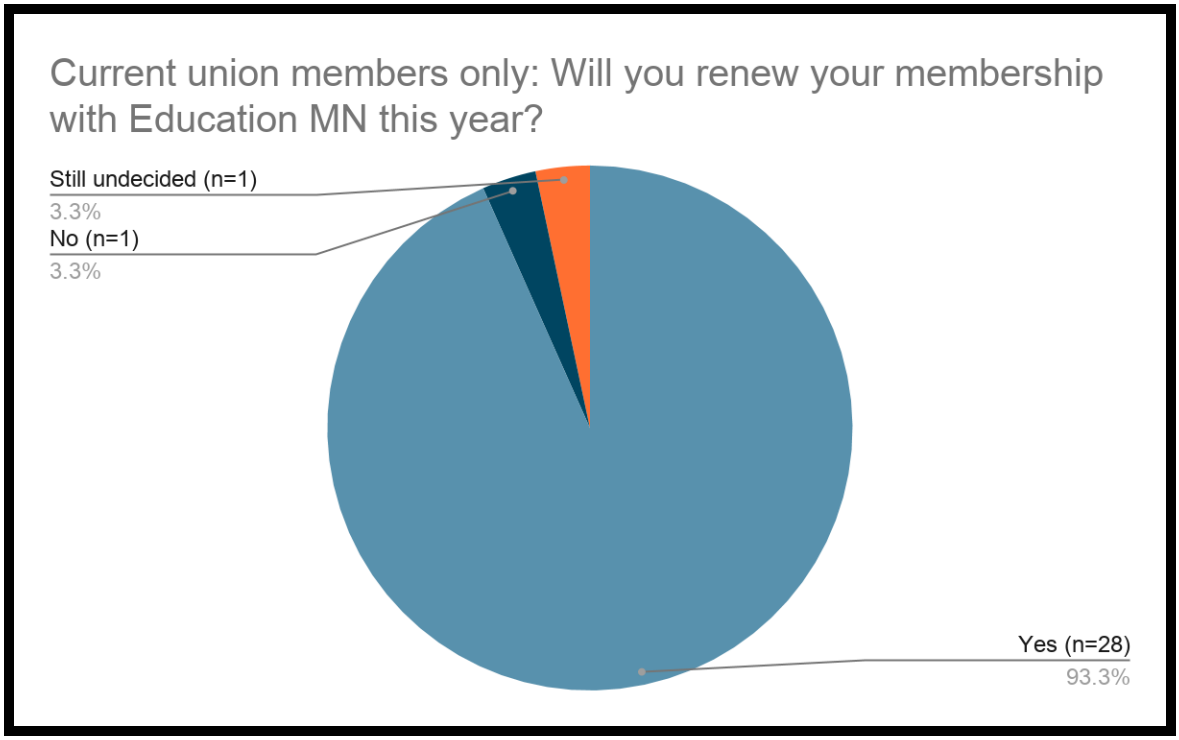
prevent educators from becoming union members or engaging in union activities. Within this section, participants were instructed to answer only the questions that applied to them, and leave blank the ones that did not apply. I believe this became a bit confusing for participants on some questions, and for that reason I decided to omit some data within this section because the responses were either repeats of previous questions or it was clear that certain educators responded to questions that were not applicable to them.

Membership Renewal. The first question, which could have been included in the "Union Membership Choice" section, but was strategically placed in a later section to provoke greater consideration by educators, asks current union members specifically (not former Fair Share fee payers or current non-members) whether or not they intend to renew their membership with Education Minnesota for the year.

After breaking down participants' answers, I found that of the 30 union members who answered, only one individual (3.3%) answered "No," while one other individual (3.3%) answered "Still undecided." The other 28 members (93.3%) answered yes, indicating that they intended to renew their union memberships for the next school year. See Figure 32 below for a graphic representation of the data:

Figure 32

Future Union Membership Renewals



While it would be inappropriate to draw any specific conclusions about the two individuals who did not choose to renew their union memberships given the very small numbers, it is nevertheless interesting to consider their demographic information. The participant who answered "No" identified as male, and indicated that he was within his first five years teaching. This participant also reported that he was 21-30 years old, had a bachelors degree plus additional coursework, and chose not to disclose his race. The participant who answered "Still undecided" also identified as male, and indicated that he had been teaching for 30+ years. This participant also reported that he was 61+ years old, had a master's degree plus additional coursework, and identified as Caucasian.

Common barriers to attending union-related events. The next question was also directed only to current union members, and asked them to look at a list of potential barriers to attending union events and select all of the barriers that specifically applied to them. One of the options was an "Other" option, where I had hoped participants would be able to type in something specific to themselves as individuals, but it appears there was a technical issue that prevented those who chose this option from being able to type anything. Participants' responses are summarized in Table 5 and Figure 33 below. While it was not included in the survey, I also decided to add an additional option into both the graph and chart: "Zero barriers get in the way of me attending union events." I chose to add this option because there was one individual who, from previous responses, identified themself as a very engaged union member, but did not select any barriers from the list, so I interpreted their lack of responses as having zero barriers to attending union events.

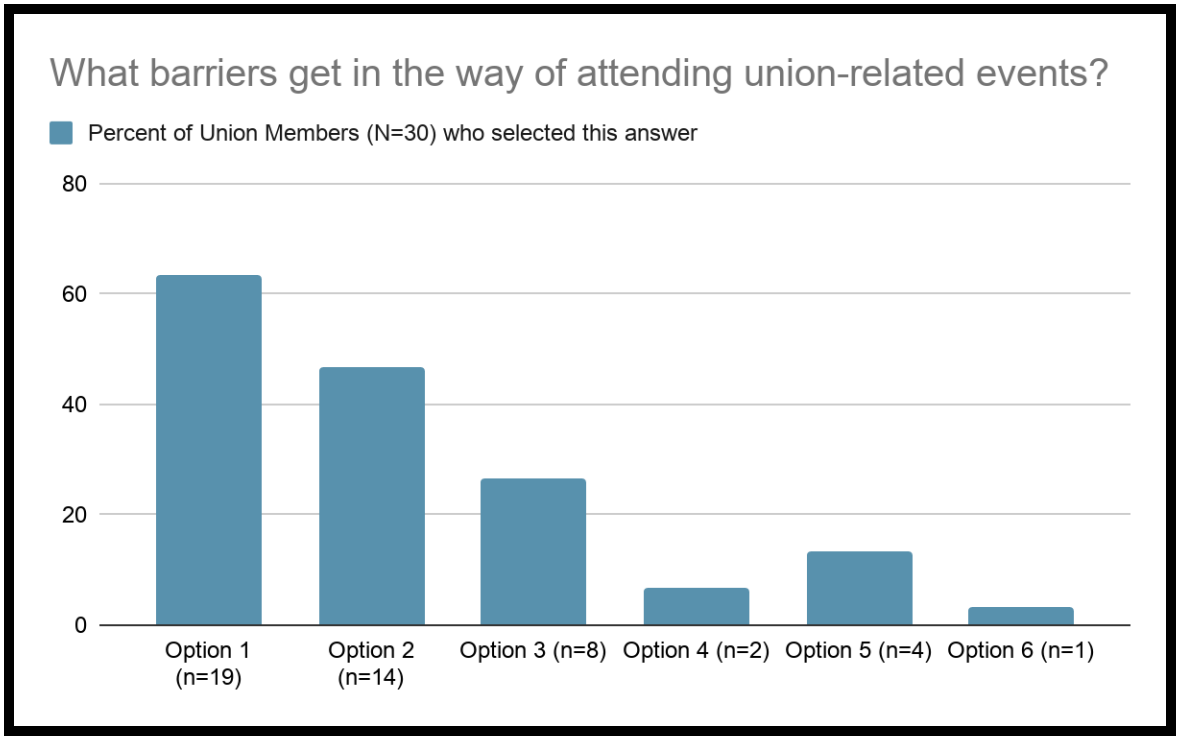
Table 5

Barriers to Union Engagement

Current union members only: What barriers get in the way of attending union-related events? (check all that apply)	
Option 1: I have too many family or personal commitments.	63.3% (N= 19)
Option 2: I have too heavy a workload.	46.7% (N= 14)
Option 3: I do not want to spend more of my time thinking about school.	26.7% (N= 8)
Option 4: I do not think union engagement is worth my time.	6.7% (N= 2)
Option 5: Other	13.3% (N= 4)
Option 6: Zero barriers get in the way of me attending union events.	3.3% (N= 1)

Figure 33

Barriers to Union Engagement



Looking at the most commonly selected barriers within the large group of 30 survey participants who responded to this question, three barriers stand out. By far the most commonly selected barrier to attending union-related events was "Option 1: I have too many family or personal commitments" (63.3%, N=19). The next most commonly selected barrier was "Option 2: I have too heavy a workload," (56.7%, N=14). The third most commonly selected barrier was "Option 3: I do not want to spend more of my time thinking about school" (26.7%, N=8). Four respondents also selected "Option 5: Other" (13.3%), while two selected "Option 4: I do not think union engagement is worth my time" (6.7%), and one selected zero barriers to union engagement (3.3%).

After analyzing participants' responses by category, I found that "Option 1: I have too many family or personal commitments" was selected the most within all subgroups. The groups with the highest percentages of educators who selected this response were educators with 6-10 years of experience (80%, N=4), educators age 31-40 years old (72.73%, N=8), and educators who identified as Caucasian (70.8%, N=17). For some subgroups, however, additional barriers were selected equally as often as the first option. Looking at years of experience, educators with 6-10 years of experience selected "Option 2: I have too heavy a workload" equally as often as they selected the first option (80%, N=4 out of 5 educators). Looking at age, educators aged 41-50 years old also selected "Option 2" equally as often as "Option 1" (66.7%, N=4 out of 6 educators), and educators aged 21-30 years old selected "Option 3: I do not want to spend more of my time thinking about school" at the same rate as "Option 1" (50%, N=3 out of 6 educators).

While "Option 5: Other," was the fourth most commonly selected barrier to attending union-related activities, and was only selected by four educators, I thought it was somewhat interesting that half of the respondents who chose this option (N=2) were educators who either identified as BIPOC or chose not to disclose their race, and that this barrier was also selected equally as often as "Option 1" among educators in this category. As mentioned before, I had hoped that educators who chose this option would be able to type in their own specific barriers to attending union-related events, but unfortunately that was not possible due to a technical issue. I am extremely curious about what these educators might have typed if they were able. Due to this finding, I would be interested in studying barriers to union engagement for BIPOC individuals in greater detail.

New (or new to the district) teachers. Initially, I had included two questions in the survey targeted specifically at new teachers and teachers who had never previously taught in a district with a union. The first question was: "New teachers OR teachers who previously taught in a district without a union: On a scale of 1 to 5, what is the likelihood that you will become a full dues-paying member of Education MN this school year?" I chose to omit data from this question, however, because I realized two issues: 1) Some educators who answered had taught for the district in years past and therefore the question did not apply to them, and 2) All respondents who actually were new teachers had already responded to the first question in this section (Will you renew your membership with Education MN this year?) with a "Yes," so this data seemed redundant. The second question aimed at new teachers and teachers who had never previously taught in a district with a union was very similar to the question on barriers, discussed above. I chose to omit this data as well, because I found that all participants who responded had already responded to the previous question on barriers with identical answers.

Former Fair Share fee payers/Current non-members. The next two questions in the survey were geared specifically toward former Fair Share fee payers and current non-members. The first question was: "Former Fair Share fee payers/Current Non-members: On a scale of 1 to 5, what is the likelihood that you will become a full dues-paying member of Education MN this school year?" Within the survey instrument, score labels ranged from 1 at "very unlikely" to 5 at "very likely" (See Appendix B: Survey Instrument page 7). There were only two non-members within the large group, and both of them selected "1" as a response. The second question asked former fair share

fee payers and current non-members to look at a list of reasons for not joining the union and select all of the options that specifically applied to them. One individual marked three responses, including “I believe teachers unions are ineffective,” “I believe the benefits of the union are not worth the costs,” and “I disagree with union political activities.” In response to the same question, the other individual selected: “Other” and was, in this case, able to type in a personalized response: “I don’t understand the benefits of the union, how much union dues cost and additionally, I was turned off when I met one of the main union people (not friendly, all business and I felt interrogated.)” It is worth noting that one other individual marked the response “I cannot economically afford union dues” within this section, but was a current union member and not a former Fair Share fee payer or current non-member at the time of the survey. They were, however, one of the same three individuals who had selected “No Membership” in response to the previous question “What level of union membership will you select in future years?” Therefore, I thought this participant’s response was relevant and worth considering.

While, again, it would not be appropriate to draw conclusions about former Fair Share Fee payers/current non-members in general as a group based on such a small group size, it is nevertheless interesting to consider respondents’ demographic information. In both cases, respondents to these questions were males who held a master's degree plus additional coursework. One was 31-40 years old and an educator with zero to five years of experience who identified as Caucasian, while the other was a 51-60 year-old educator with six to ten years of experience who identified as being of two or more races. A third individual, who erroneously responded in this section, but had indicated from past

responses that they would not renew their union membership in the future, also identified as male and was 31-40 years old with zero to five years of experience as an educator. He held a bachelor's degree plus additional coursework, and in response to the question "What is your race?" indicated: "I prefer not to say." I found it somewhat interesting that all of the individuals who chose to become non-members going forward identified as male when educators identifying as male made up only 37.5% of the whole group (N=12).

Union Attitudes and Beliefs

The penultimate section of questions in the survey was related to educators' attitudes and beliefs surrounding teachers unions. Because the final section of the survey was devoted to identifying individuals to participate in unstructured interviews, this section was actually the last section of questions that were relevant to the collection of participants' opinions regarding teachers unions. It consisted of three parts: 1) the first four questions, in which participants indicated their levels of agreement with a set of statements, 2) the fifth question, which concerned participants' opinions about union work and communication styles, and 3) the sixth question, which focused on ways to improve teachers unions.

Questions 1-4. For the first four questions of this section, participants were asked to read a set of statements and then indicate their level of agreement with each statement by selecting a number on a Likert scale from one to five, with one meaning "strongly disagree" and five meaning "strongly agree. " For example, the first statement was: "Teachers unions do important work" (See Appendix B: Survey Instrument page 8).

In general, a higher level of agreement on each of the four statements indicated a higher degree of approval and/or feelings of favorability for teachers unions. The first statement in this section was: “Teacher unions do important work.” The second statement in this section was: “The benefits teacher unions provide their members are worth the cost.” The third statement in this section was: “Teacher unions work for the best interest of students,” and the fourth and final statement in this section was: “Teachers unions are successfully evolving to meet the needs of a changing world.” After calculating each participant’s average agreement level across the four questions, I then added up the averages for all participants and divided by the number of participants (N=32) to calculate an overall average agreement level of 4.27 for the group. I was able to calculate a whole-group average for each question as well (see Table 6 below).

Table 6

Teachers Union Approval

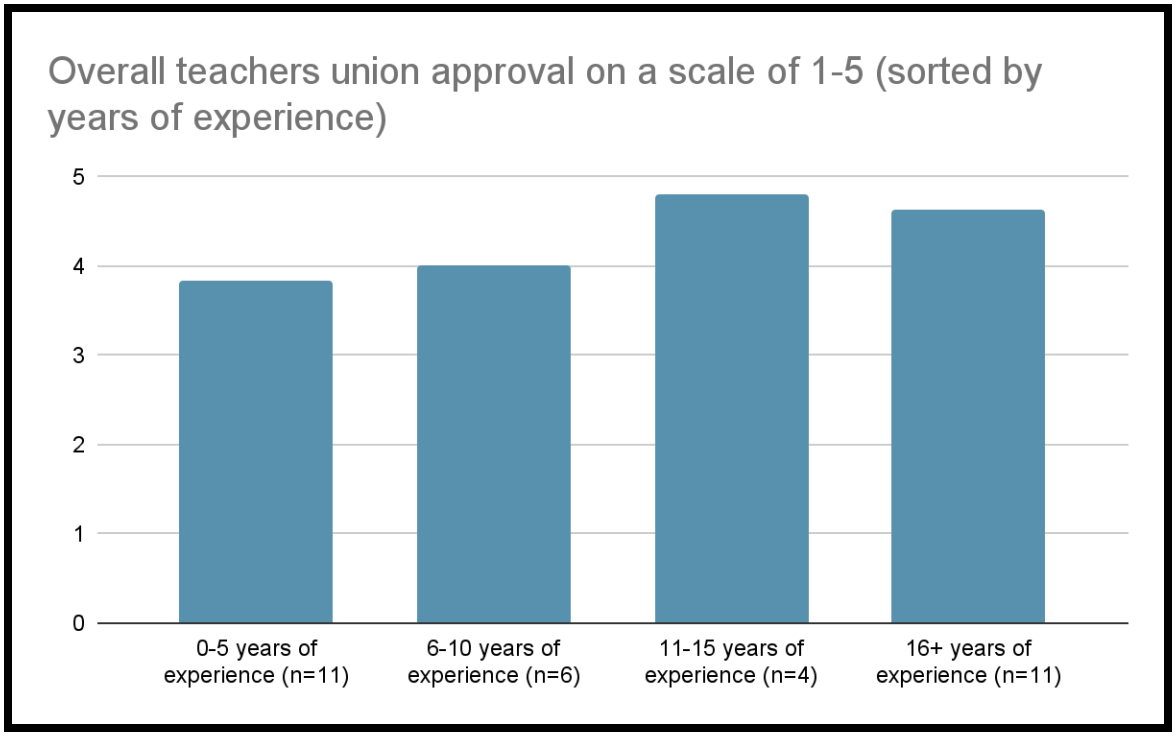
On a Scale of 1 to 5, how much do you agree with the following statements? (1=Strongly Disagree; 5=Strongly Agree)	
Statement	**Average Response (N=32 participants)**
1. Teacher unions do important work.	4.53
2. The benefits teacher unions provide their members are worth the cost.	4.46
3. Teacher unions work for the best interest of students.	3.97
4. Teachers unions are successfully evolving to meet the needs of a changing world.	4.06
Statements 1-4 Overall	4.27

I also broke the data down by category, calculating average agreement levels by years of experience, age, and race. After analyzing the results of the first four questions by years of experience, it appears that educators with higher levels of experience were, in general, more likely to approve of/show favorability for teachers unions, with an exception for one group. Educators with 11-15 years of experience (N=4) expressed the highest level of agreement with the statements, with an overall average agreement level of 4.81 out of 5 across the four questions. Educators with 16+ years of experience (N=11) showed the next highest level of agreement with the statements, with an average agreement level of 4.63 out of 5. Educators in the categories with the fewest years of experience, by contrast, showed the lowest levels of agreement with the statements, with an average agreement level of 4.0 out of 5 for educators with six to ten years of

experience (N=6) and an average agreement level of 3.84 out of 5 for educators with zero to five years of experience (N=11). See Figure 34 below for a visual representation of the data:

Figure 34

Teachers Union Approval by Years of Experience

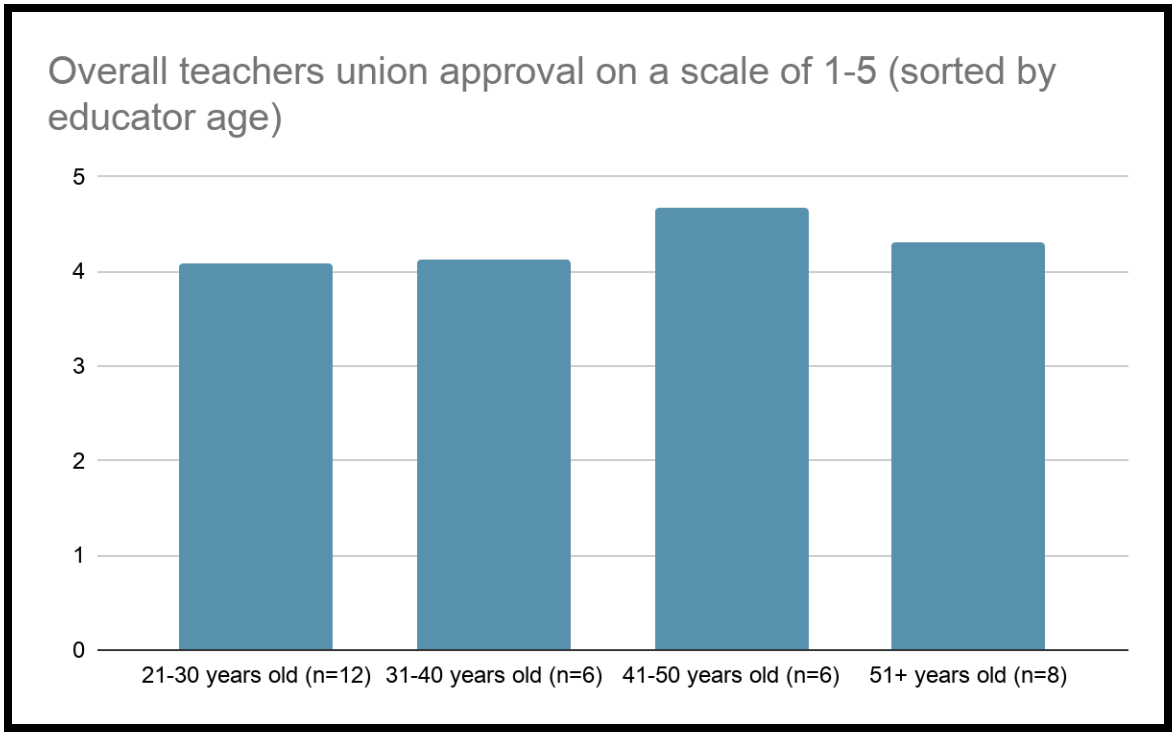


Looking at the results of the first four questions by age, a similar pattern emerged. In general, older educators were more likely to approve of/show favorability for teachers unions, with the exception of one group. The group that expressed the highest level of agreement with the four statements was educators aged 41-50 years old (N=6), with an average agreement level of 4.67 out of 5. The group that expressed the next highest level of agreement with the four statements was educators aged 51+ years old (N=8), with an

average agreement level of 4.31 out of 5. Educators in the two youngest groups, 31-40 year-olds (N=12) and 21-30 year-olds (N=6), however, showed the two lowest levels of agreement with the four statements, with average agreement levels of 4.13 out of 5 and 4.08 out of 5, respectively. See Figure 35 below for a visual representation of the data:

Figure 35

Teachers Union Approval by Age

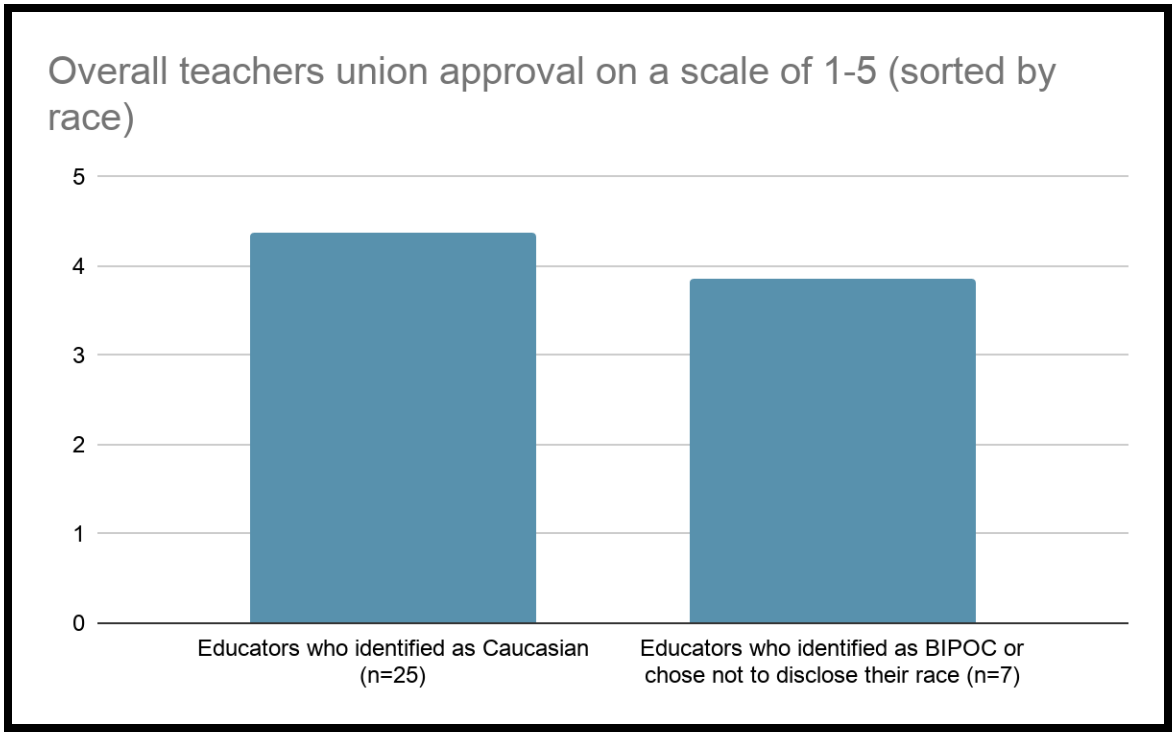


After analyzing the results of these questions by race, I was somewhat surprised to find that by percentage, educators who identified as Caucasian expressed what seemed to be significantly higher levels of agreement with the four statements than did educators who identified as BIPOC or chose not to disclose their race. In hindsight, however, I realize that these results seem to fit with other trends around union membership,

engagement, and beliefs within this group. Educators who identified as Caucasian (N=25) averaged 4.38 out of 5 on the four questions, while educators who identified as BIPOC or chose not to disclose their race (N=7) averaged 3.86 out of five. Therefore, by percentage, educators who identified as Caucasian were more likely to approve of/ show favorability for teachers unions than were educators who identified as BIPOC or chose not to disclose their race (see Figure 36 below). Whether or not this trend would hold if the study were replicated with higher numbers of educators in each group, however, is unclear.

Figure 36

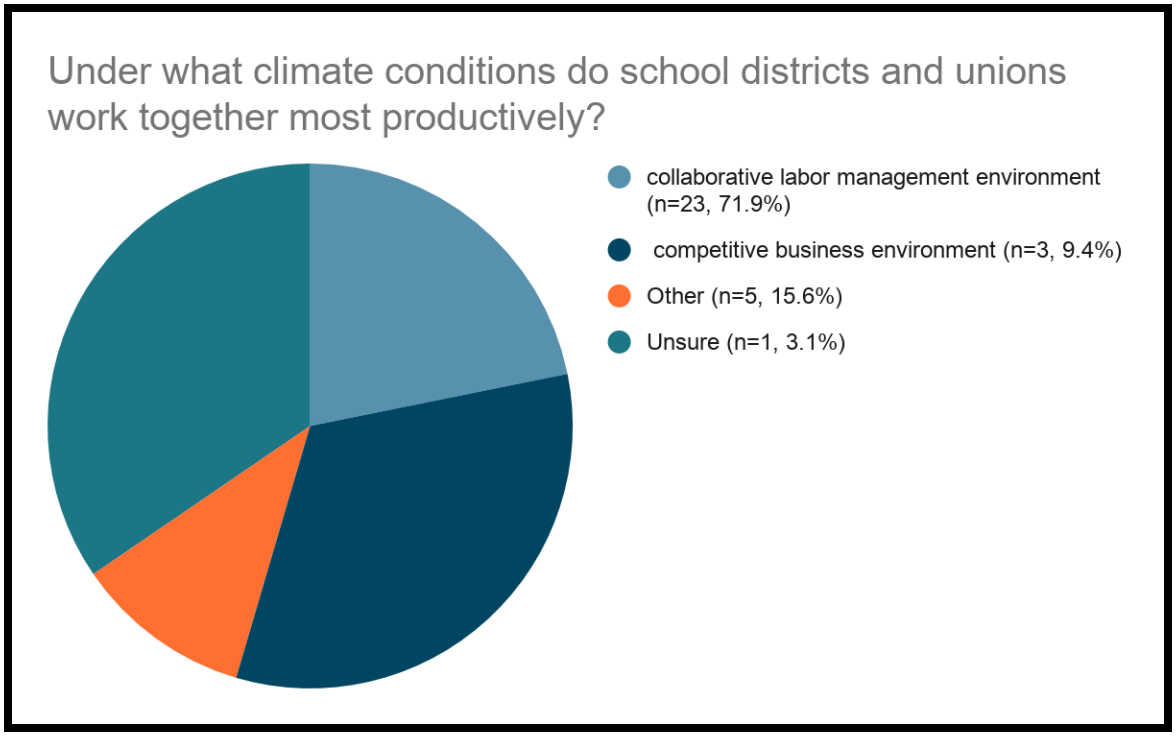
Teachers Union Approval by Race



Question 5. The fifth question in this section was: "Under what climate conditions do school districts and unions work together most productively?" Participants were asked to choose the one option they thought best completed the question. The options were: "In a collaborative labor management environment," "In a competitive business environment," "Other," or "Unsure." See Figure 37 below for a visual representation of the data:

Figure 37

Union/District Work Climate



The two most popular selections on this question were "In a collaborative labor management environment" and "unsure." The vast majority of participants (71.9%, N=23) chose the collaborative labor management option. Over 40% of each subgroup

chose this option, with educators with 16+ years of experience (N=11, 90.9%), educators aged 41-50 years old (N=5, 83.3%), and Caucasians (N=20, 80%) representing the subgroups who chose it at the highest rates. The next most popular choice for this question was “unsure,” with 15.6% of participants selecting it (N=5). Percentage wise, educators with zero to five years of experience (N=4, 36.4%), educators aged 21-30 years old (N=2, 33.3%), and educators identifying as BIPOC or choosing not to disclose their race (N=2, 28.6%) were the subgroups who chose it at the highest percentages. Based on these findings, it appears that educators who were most likely to favor a collaborative business environment, while younger and less experienced educators were the most likely to be unsure about how teachers unions and school districts work together most productively.

After “unsure,” the next most popular option was “In a competitive business environment,” and it was chosen by 9.4% of the entire group (N=3). These three individuals were educators representing three different experience subgroups and three different age groups. The only subgroup to which a majority of respondents who chose this option belonged was educators who identified as BIPOC or chose not to disclose their race (N=2, 28.6%). Why, when examining results by race, this option seemed to be so much less popular among educators identifying as Caucasian (N=1, 4%) is unclear. This finding adds to a growing list of questions about differences in union membership and engagement that emerged between educators who identify as BIPOC and educators who identify as Caucasian.

The final option given for this question was “other,” and it was only selected by one educator (3.1%). As within past sections, I had hoped that participants choosing this option would be able to type in their own personalized response, but due to another technical error, that was not possible on this question. Because of other data given by this participant, I do know that this educator was a 31-40 year-old male who identified as Caucasian, held a master’s degree plus additional coursework, and had been teaching for zero to five years. While the participant’s specific reason for choosing “other” is unclear, their response leaves me curious about what other types of climate/working conditions educators might hope for.

Question 6. The last question in this section asked participants to think about what factors might help teachers unions improve. Their task was to complete the sentence “Teacher unions would be better if…” by looking at five different options and selecting all options that they believed would apply. Within the large group of 32 educators, the most commonly selected answer was “Option 4: They focused more on racial equity,” which was chosen by 15 participants (46.9%). The second most commonly selected answer was “Option 3: They did more work to reform teacher evaluation and the tenure system,” which was chosen by 13 participants (40.6%). The third most commonly selected answer was “Option 1: They offered better professional development opportunities,” which was chosen by nine participants (28.1%). The two answers that were selected the least among participants were “Option 5: Other,” and “Option 2: They spent less time and money on political activities,” which were selected by seven participants (21.9%) and four participants (12.5%) respectively. See Tables 7-10 below:

Table 7

Priorities for Union Reform: Whole Group

Teacher unions would be better if (check all that apply)	
Reform Option	**%/Number Selected Out of All Educators Surveyed (N=32)**
Option 1: They offered better professional development opportunities.	28.1% (N=9)
Option 2: They spent less time and money on political activities.	12.5% (N=4)
Option 3: They did more work to reform teacher evaluation and the tenure system.	40.6% (N=13)
Option 4: They focused more on racial equity.	46.9% (N=15)
Option 5: Other	21.9% (N=7)

Table 8

Priorities for Union Reform by Years of Experience

Teacher unions would be better if... (check all that apply)				
Reform Option	**Number/% Selected by Each Experience Group**			
	0-5 (N=11)	**6-10 (N=6)**	**11-15 (N=4)**	**16+ (N=11)**
Option 1: They offered better professional development opportunities.	4 = 36.4%	1 = 16.7%	3 = 75%	1 = 9.1%
Option 2: They spent less time and money on political activities.	2 = 18.2%	0	0	2 = 18.2%
Option 3: They did more work to reform teacher evaluation and the tenure system.	4 = 36.4%	3 = 50%	1 = 25%	5 = 45.5%
Option 4: They focused more on racial equity.	7 = 63.6%	2 = 33.3%	1 = 25%	5 = 45.5%
Option 5: Other	1 = 9.1%	2 = 33.3%	2 = 50%	2 = 18.2%

Table 9

Priorities for Union Reform by Age

Teacher unions would be better if...(check all that apply)				
Reform Option	**Number/% Selected by Each Age Group**			
	21-30 (N=6)	**31-40 (N=12)**	**41-50 (N=6)**	**51+ (N=8)**
Option 1: They offered better professional development opportunities.	1 = 16.7%	6 = 50%	0	2 = 25%
Option 2: They spent less time and money on political activities.	1 = 16.7%	1 = 8.3%	0	2 = 25%
Option 3: They did more work to reform teacher evaluation and the tenure system.	2 = 33.3%	6 = 50%	2 = 33.3%	3 = 37.5%
Option 4: They focused more on racial equity.	4 = 66.7%	6 = 50%	3 = 50%	2 = 25%
Option 5: Other	1 = 16.7%	2 = 16.7%	2 = 33.3%	2 = 25%

Table 10

Priorities for Union Reform by Race

Teacher unions would be better if...(check all that apply)		
Reform Option	**Number/% Selected by Each Racial Group**	
	BIPOC + (N=7)	**Caucasian (N=25)**
Option 1: They offered better professional development opportunities.	3 = 42.9%	6 = 18.8%
Option 2: They spent less time and money on political activities.	1 = 14.3%	3 = 9.4%
Option 3: They did more work to reform teacher evaluation and the tenure system.	1 = 14.3%	12 = 37.5%
Option 4: They focused more on racial equity.	2 = 28.6%	13 = 40.6%
Option 5: Other	3 = 42.9%	4 = 12.5%

After sorting group data by category, I found that Educators' answers varied somewhat depending on their years of experience. Among the 11 educators within their first five years of teaching, seven (63.6%) selected "Option 4: They focused more on racial equity," which was by far the most commonly selected answer within the group. Among the six educators with six to ten years of experience, the most commonly selected answer was "Option 3: They did more work to reform teacher evaluation and the tenure system," with three educators (50%) choosing this option. Three (75%) of the four educators with 11-15 years of experience chose "Option 1: They offered better professional development opportunities," making it the group's top choice, while

educators with 16 plus years of experience (N=11) split their top choice between both the third and fourth options, with five participants (45.5%) choosing each one. Educator's ideas on how teachers unions could improve, therefore, differed somewhat depending on their experience levels.

I found somewhat less variety when looking at educator's answers by age. Among all groups except educators over the age of 51 years of experience, "Option 4: They focused more on racial equity" was the most commonly selected answer. For educators aged 31-41 years old (N=12), the top choices were actually divided equally between 3 options: "Option 4: They focused more on racial equity," "Option 1: They offered better professional development opportunities," and "Option 3: They did more work to reform teacher evaluation and the tenure system," all of which were chosen by six (50%) of educators in the group. "Option 3: They did more work to reform teacher evaluation and the tenure system," was the most commonly selected answer among the eight educators over the age of 51 years old (37.5%, N=3), with all other answers selected by the group divided equally between the other four options. It is clear that within some groups, like educators aged 31-40 years old and educators aged 51+ years old, a wide variety of answers were selected. However, when looking at participants' top answers by age group, it appears that, excluding the oldest educators, racial equity was a top priority.

After analyzing educators' answers by race, a few interesting findings emerged. For educators who identified as Caucasian, the most commonly selected answer was "Option 4: They focused more on racial equity," with 13 out of 25 participants (40.6%) choosing this option. "Option 3: They did more work to reform teacher evaluation and

the tenure system," was a close second among educators who identified as Caucasian, with 12 educators (37.5%) choosing this option. Among educators who identified as BIPOC or chose not to disclose race, however, both "Option 1: They offered better professional development opportunities," and "Option 5: Other," were chosen most often, with three out of seven participants (42.9%) selecting both answers. The second most popular answer among educators identifying as BIPOC was "Option 4: They focused more on racial equity," with only 28.6% (n=2) selecting this option. I found it interesting that the equity option was so popular among educators who identified as Caucasian, but apparently less so for educators who identified as BIPOC or chose not to disclose their race. I also found it interesting that such a high percentage of educators who identified as BIPOC or chose not to disclose race (42.9%, N=3 out of 7) chose "Option 5: Other," compared to all other groups. It makes me extremely curious about what each respondent would have said if given the chance to type their answer.

Option 2 was the least popular choice among educators surveyed. Only four individuals (12.5%) selected this option, indicating that they believed teachers unions would be better if they spent less time and money on political activities. Educators who chose Option 2 were either teachers in their first five years (N=2, 18.18%), or educators with 16+ years of teaching (N=2, 18.18%). Half of them (N=2) were educators aged 51+ years old, while the other two individuals who chose this option were within the two youngest age groups. Three of these educators identified as Caucasian (12%), while one individual identified as BIPOC or chose not to disclose their race (14.29%). Thus,

individuals who chose this option represented a fairly wide array of participant subgroups.

Interview Opt-in

The final section of this survey was focused solely on identifying participants for semi-structured interviews, and did not gather any new data on participants' opinions regarding teachers unions. In this section participants were first directed to read a paragraph with information on the semi-structured interview process. Next, they were directed to answer the question "Do you agree to participate in a semi-structured, one-on-one interview with the researcher?" with the possible choices being "Yes" or "No." Then, participants who selected "Yes" were directed to type in their name and contact information so that I could get in touch with them to schedule interviews. The final question of the survey was a repeat of a previous question, which I included so that I could choose a fairly representative cross-section of participants for interviews without having to look back at previous data. It read: "This is a repeat of question #12: What level of union membership will you select in future years? (NOTE: These options reflect the new Education MN membership choices as of June 2018. Fair Share fee payers are now considered non-union members unless they voluntarily register as a new member of Education MN)." The options available to participants were: "Full dues-paying member," "Full dues minus cost of fees associated with Political Action Committee and/or Education MN Foundation," "No membership," and "Not applicable because I will not be teaching OR I will be teaching in a district without a union." All together, 18 out of 32 participants indicated they would be open to participating in a semi-structured interview,

and responded to the final two questions. I used these results to select four individuals to participate in semi-structured interviews. Details of these interviews are discussed in greater detail in the next section.

Survey Summary

After detailing the findings of the survey portion of this study, three major themes stand out to me as the researcher. First, as I somewhat expected, higher educator age and years of experience seemed to be associated with higher knowledge of union services/benefits, higher rates of union membership, and higher feelings of favorability toward teachers unions. Second, higher educator age and years of experience were not necessarily associated with higher levels of union engagement, and certain types of union activities drew more union engagement than others. Third, educators who identified as BIPOC or chose not to disclose their race seemed to view teachers unions less favorably, and to engage with the union differently. They also seemed to experience different barriers to union membership and engagement than educators who identified as Caucasian. Because the educators who identified as BIPOC or chose not to disclose their race in this survey indicated that they would change their current union membership status, both to union member and to union non-member, at higher percentages than did Caucasian educators, data also suggested that educators within this group may be more variable in terms of union membership. For these reasons, I have many lingering questions about educators who identify as BIPOC or choose not to disclose their race, and will keep them in mind for future research.

Semi-Structured Interview Results

The second phase of data collection in this study was a series of "semi-structured interviews," which were meant to capture participants' thoughts and feelings about teachers unions in greater depth, and help me to better answer the research question: *How do teachers make decisions around union membership and engagement in my middle school setting?"* Initially, I planned to select five to ten individuals to participate in semi-structured interviews, and wanted to choose individuals who were, in general, representative of the original pool in terms of union membership and engagement. However, I later decided to pair down the number of interviews to four, and focus on gathering the perspectives of participants with a diverse array of beliefs and experiences regarding union membership and engagement. As mentioned above, participants for the interviews were chosen based on the final section of the survey, where those who were open to doing an interview were able to "opt in," and leave their contact information for me to follow up.

After selecting four participants from the 18 who "opted in" to interviews, I followed up with each one to officially invite them to interview, as well as have them fill out an informed consent form and arrange a convenient interview time. Because interviews took place during the summer of 2020, in the middle of the COVID-19 pandemic, all consent forms were signed and handled digitally and all interviews were conducted remotely via video chat. During interviews, I loosely adhered to the "Semi-Structured Interview Protocols" document that I created to help guide questions (see appendix D). Most questions were similar to questions that appeared on the survey,

and my intention was to use them as a starting point, but to allow participants to go into greater depth in answering questions regarding union membership and engagement. All four interviews were recorded with the participants' consent. In order to protect interviewees' private information, I referred to each one below using pseudonyms and later deleted their interview recordings following the publishing of this capstone. Summaries of each interview are documented below:

Interview 1: Jenny

Profile. Jenny is a female educator between 31 and 40 years old who identifies as Caucasian. She initially got her bachelor's degree, along with a kindergarten-6th grade elementary education teaching license and a 5th-8th grade Science teaching license, from the University of Minnesota Duluth in 2000. Later, she got a license in Keyboarding for Computer Applications along with a Masters in Education from Hamline University. She spent the first few years of her career substitute teaching in our district, and then landed her first contract job at an elementary school near our building. When her position was cut, however, she moved to a small, rural district outside of the northwestern Twin Cities Suburbs. She ended up spending 11 of her 15 years teaching there, and working as a "jack-of-all-trades," as she called it. There, she taught a variety of subjects including k-8 computer technology, second grade Title I[2], and 7th grade science, all at once. She also got extremely involved in the teachers union, and spent five years in a major union leadership role. She eventually got extremely burnt out, both with her job and with her union role, and moved back to our district, where she has been teaching 6th grade science

[2] Title I is a federally funded program that is designated for students who need extra support in the areas of reading and/or math.

for the past two years. She is married to a proud member of the pipe-fitters union, and they have two dogs.

Union knowledge/experience. As may be expected with a former union leader, Jenny is extremely knowledgeable about the work of teachers unions, and in addition to her former role as a local union leader, has participated in many union events at the local, state, and national level throughout her time as an educator. Though she wants to avoid the burnout she experienced in her previous district and intentionally spends less time and energy participating in union activities now than she did as a union leader, she makes it a point to stay well informed on union matters and regularly participates in local union general membership meetings. She also enjoys going to large state and national union conferences and governing/negotiating meetings, and plans to continue participating in large union events across the state and country if possible. Jenny said that she might also be interested in becoming an Education Minnesota Governing Board member in the future.

Jenny says she has been learning a lot about our local union after moving to our building from such a small district, where school and union operations were very different. She says that learning about our teacher contract and insurance have been an adjustment, but she is becoming more familiar with the way our local union works. She also finds it difficult that in such a large district, it is significantly harder to communicate directly with union leadership, since communication typically has to go through "channels," or different levels of the local union hierarchy, whereas in the past she could easily communicate with anyone in the union because there were fewer people and they

all worked within the same area. Nevertheless, she appreciates the time and energy that is required to run a union in such a large district and is happy to stay engaged by attending general membership meetings.

Personal beliefs about teachers unions. Jenny firmly believes in the power of unions, and the idea that the more you give to your union, the more it can give back to you. She also believes that the more you invest in your union, the more you realize how much more there is to learn, and the issues at stake for educators. For these reasons, she has always been a full dues-paying union member and says she will continue to be a full dues-paying member. She would never consider becoming a non-member.

Jenny told me that early in her career, the political aspect of unionism bothered her, especially because she grew up conservative and the union tended to be rather left-leaning. After being in a union leadership role, however, her views around unions and politics began to change. She realized that education really cannot be separated from politics, and that teachers need to make their voices heard in the political arena in order to bring about the best possible outcomes for their profession. She said she believes that teachers benefited when our current governor, Tim Walz, was elected, and the union was instrumental in making that happen. She now believes that the political advocacy unions provide, and the way they help teachers amplify their voices in the political arena, is perhaps one of the most valuable benefits provided by the teachers union.

Barriers to union engagement and areas for reform. Jenny said that sometimes the timing of union meetings and events can be a barrier to her attendance, but that it is not a major issue for her because she does not have many other major demands on her

time. She also said “There’s power in the ask,” suggesting that perhaps she would get more engaged from time to time if someone asked her personally. The biggest barrier to union engagement for her, Jenny told me, is not related to personal factors or logistics, but to communication issues at the building level.

Getting more specific, Jenny said she finds it problematic that many union communications come through our union building representatives, and are not always timely. In addition, she finds it problematic that the building union representatives often do not make it to general membership meetings and other union meetings, and the information that is covered in those meetings doesn’t get relayed to other union members in our building. She also sees a need for our building union representatives to focus more time on building relationships with other union members in our building, since she and other newer staff members barely know them. Based on these issues, she said she feels the biggest area for union reform in our district is the way our union organizes its leadership and communication at the building level. She acknowledged that it is probably difficult for building union representatives to meet all of the needs that are present when they are not being paid, and suggested that they be given a stipend and special training to create some accountability for the work they are expected to do, including attending local union meetings, building relationships, and relaying information to other members. She also suggested that we change the way union emails circulate throughout the district so that they are coming directly through the president and other members of the executive board whenever possible, and not through channels.

Interview 2: Ahmed

Profile. Ahmed is a male educator between 21 and 30 years old who identifies as Black/of African descent. Ahmed got his bachelor's degree at Metropolitan State University, along with a 5th-12th grade math teaching license, in 2015. He began his career teaching math at a high school in our district in the fall of the 2015-2016 school year, and spent two years there. During that time, he also returned to Metropolitan State University to complete a master's degree in Urban Education. He moved to our building in 2018, and has been teaching 7th grade math for the past two years. He is single with no dependents and tries to commit himself as much as possible to organizing, both for the union and in the name of advancing racial equity for his students and the world.

Union knowledge/experience. Ahmed considers himself very knowledgeable about the work of unions at the local, state, and national level, and says he has seen many examples of the ways union work has impacted both himself as a teacher and education in general within all three union spheres. Specifically, he talked about seeing the way union negotiations with the district have impacted teacher contracts at the local level (he is not a union negotiator, but has watched the process closely). He also talked about how his work in lobby groups at the state level has helped advance pro-education legislation and put pressure on legislators to reject bills that would hurt public education. In addition, he said that he has observed how teachers unions work together to influence Congress for the benefit of education at the national level, and has participated in some of these efforts through national union conferences.

In his short time as an educator, Ahmed has been extremely involved in union activities. He said his union engagement started during student teaching, when his

cooperating teacher made it a point to expose him to professional developments and events put on by the union that she thought would be beneficial. Once he started his first job, however, he didn't engage in union activities until later on in the school year. He said he was overwhelmed with being a first-year teacher and working on his master's degree, and so he didn't attend union events. He decided to finally attend a union event towards the end of the year when another teacher invited him, and from there he got more and more involved. He ended up joining one of the union's affinity groups, the African American Educators Forum, and also participated in several other union initiatives, like conferences and lobby days. In addition, he participated in the Early Career Leadership Fellows (ECLF) program along with me during the 2017-2018 school year. He said he hopes he can continue to be very involved with the union going into the future, and perhaps even take on some sort of union leadership role.

Personal beliefs about teachers unions. Ahmed was a full dues-paying member of the teachers union before the *Janus* decision came down, and said he will without a doubt continue to be a full dues-paying union member into the future. He told me he is a part of the union because he believes they do very important work for both educators and students, and the benefits they provide are extremely valuable and worth the costs. He also said that a union is only as strong as its members, and the more educators join and invest in their unions, the more powerful they will be in advancing public education. He said that if educators were to leave their unions in large numbers, they would become weak, and Minnesota educators could end up like teachers in states like Wisconsin, where union power has been decimated and teachers have been subject to the whims of district

administrators without much of a say in their contracts. Thus, for Ahmed, being a union member essentially means being an active team member who works together with other educators toward a set of collective goals.

Ahmed believes that one of the most important benefits that teachers unions provide is professional development. He feels it is beneficial not only because it helps teachers be their best for their students and their profession, but it also fosters a sense of community and it helps educators who may be feeling burnt out reignite their passion for education. In this way, he said, it brings educators together, boosts morale, and helps them discover their collective voice. This energizing aspect is one reason why Ahmed chooses to be so engaged in the union.

Ahmed also believes that in today's world, legal representation is another incredibly important benefit that the union provides. Because it is not uncommon for teachers to find themselves in "hot water" over misunderstandings, miscommunications, or issues that arise with students, parents or administrators, he says, it is essential that the educators have this resource. "It's not easy in there, you know. You don't know what is going to happen. Your life could be turned upside down and you could be stressing about your job. Join the union because they have your back," he said.

Barriers to union engagement and areas for reform. Ahmed said that for him, classroom workload and various things that come up within his personal life are the only barriers that sometimes get in the way of his union engagement. He said that when his work at school or things at home drain his mental energy, he sometimes feels like going to union events adds too much to his plate, and he needs to focus on something

completely unrelated to work or education to get self-care. Most of the time, however, he makes the conscious choice to attend union events because he enjoys them and genuinely cares about their outcomes.

Ahmed expressed optimism when I began asking him questions about aspects of unionism that often draw criticism. Despite all the upheaval that has gone on in the world of education in past years, especially since the global pandemic started, he still believes that unions are working for the best interests of students, and are slowly but surely evolving to meet the demands of a changing world. He did not offer any specifics on that point, but confirmed that he was satisfied with the job union leaders were doing, and believed they were doing their best to meet the changing needs in front of them.

When asked about areas where he saw a need for union reform, he seemed somewhat surprised to even consider the idea, and I got the sense that I was perhaps one of the first people he'd met to bring up such a question. He thought for a while but had little to offer other than to say that at all levels he believed teachers unions could improve the way they organize and communicate with members. He said he believed the union could potentially be doing more to get members "on the same page" around union efforts and initiatives, and could perhaps improve by utilizing technology and marketing more effectively.

Interview 3: Michelle

Profile. Michelle is a female educator between the ages of 41 and 50 who identifies as Caucasian. She got her bachelor's degree and initial teaching license in 7-12th grade English Language Arts from St. Cloud State University, and later got a

Master's in Curriculum and Instruction from St. Catherine's University, as well as a k-12th grade Reading license and a 5-8th grade Communication Arts license. Outside of school, she spends lots of time prepping for her teaching job, as well as reading, and maintains a blog devoted to middle school literature. She is married to another teacher, and they have three high school/college aged children.

All together, Michelle has been teaching around 21 years. Like Jenny, Michelle also began her teaching career in our school district, where she taught high school English Language Arts, but ended up leaving and teaching elsewhere for several years before returning. After initially leaving our district and taking a leave of absence for a year to care for her then small children, she taught middle school English Language Arts in a school district in an outer-ring suburb, where she stayed for ten years. She then made a move to a school district in greater Minnesota, where she stepped out of the classroom and tried working in the district office. She soon realized that she "hated it," and left, going on to experience what she called a "sort of a mid-life crisis." She spent a few years teaching in different school districts, struggling to find a place that really felt like the right fit. First, she tried teaching middle school English Language Arts in another greater Minnesota school district. Then, she left and went to work as a reading specialist in an urban middle school, but was let go three months into the position after issues with the principal, who she later found out had developed a poor reputation in the district. "It was the craziest experience of my life," she said. She asked the union for assistance in communicating with the district about her firing, which she felt was arbitrary and unfair, but they denied her any support (even though she was a member). She then decided to

leave the district and began applying for mid-year teaching positions. She accepted an 8th grade English Language Arts position in our building, taking over for a teacher who had left due to mental health and other issues. She says it was a very difficult position at first because she came into a classroom that was in utter disarray, but she made it through, and now loves her position.

Union knowledge/experience. Despite the negative union experience mentioned above, Michelle has always been a full dues-paying union member. She said she grew up in a "union family," and learned to value the union early on because many of her family members were union members. She also says she can see the specific ways that the union has benefited her father, who was a union plumber, and has "amazing" health insurance and retirement benefits. She told me she believes there is power in numbers, and that more people coming together towards a goal creates better opportunities for all.

Michelle said that in the past, she never participated in union events, and dreaded anything having to do with union matters because in one of her previous school districts (the one where she spent ten years teaching) things between the union and the district were always contentious. "I felt like we were always, like, ready to go on strike," she said. Even though they never did go on strike, they went on "work to rule" and prepared for the possibility of striking multiple times. She said it has actually been refreshing to now be in our district, where the relationship between the district and the union seems to be more collaborative and information coming to members is better communicated.

Michelle said she is not very knowledgeable about the work of the national teachers unions, but is a bit more knowledgeable about the work of Education Minnesota

because she reads the publications they send her. She does not keep a very close eye on what our local union does, though she reads the union emails that get sent out from time to time, and recently watched a recording of a union general membership meeting. She said she is now open now to doing more, like going to building union meetings and general membership meetings when logistically feasible (she and her husband carpool so it is difficult to make it a lot of the time), or watching meetings online. She said she is also open to being a worksite action leader who helps get the word out about different political causes and how teachers can take action to get their voices heard.

Personal beliefs about teachers unions. As mentioned above, Michelle does believe that unions are valuable because she thinks educators can accomplish more working together than they can individually. She believes that unions do important work and that the benefits unions provide are worth the costs, though she realizes that from one district to another local unions can look very different, and be more or less valuable to members depending on where they are. Her negative experience in the urban district where she was fired taught her that. “I kind of just want to tell all the teachers in [the urban district] not to pay their dues until they’re tenured,” she said. She also believes that most of the time teachers unions work for the best interests of students, but for the same reason feels there are some times or areas where they might not.

Barriers to union engagement and areas for reform. When asked whether or not she believed teachers unions were successfully evolving to meet the needs of a changing world, Michelle was less optimistic and answered: “Not completely.” She said she sometimes gets frustrated with teachers unions because she feels like their work in

the legislature and Congress often feels rather removed, and wishes she could get more union support making actual changes in her building "from the ground up." She feels like the local union also tends to focus on district-wide issues and initiatives and be very "top-down," but teachers at our school, which is demographically very different from the rest of the district, often don't get the specific support they need. She said that she wishes more representatives from the union could come into our building to see what is going on more often, because it feels like they have no idea what actually goes on there. For these reasons, she wishes the union could act as more of a partner for teachers at the building level and help them make "grassroots" changes rather than focusing on decisions at the district level that may not actually address everyone's needs.

Another area for reform that Michelle mentioned had to do with the issue of union protection for ineffective teachers. She said that she gets angry because she sees that there are teachers who should not be teaching who are kept around despite the fact that they are not doing what is best for students. "It bothers me. I'm not asking teachers to be perfect because we all make mistakes and learn and grow, but clearly we have teachers, and there's been teachers everywhere I've been, who are not meant to be teachers...and we continue to let kids have these teachers and it's wrong," she said. She said she believes that teachers who struggle should receive help and be given a chance to improve because teaching is not easy, especially in the beginning of one's career. However, there are still clearly teachers who are not effective years into their career, she said, and this is hurting kids. Michelle told me she believes this problem is not solely a union problem, but also a problem with building leadership, and that she believes there needs to be better

communication between administrators and the union in order to solve it. She hears that unions are not allowing principals to let ineffective teachers go, but she also knows that in order to terminate an ineffective teacher, principals first need to document the problems they are seeing with those teachers, and she feels like somewhere along the line the system is failing. “I wish there was some communication between principals and unions,” she said “About, you know, what are we going to do with teachers who really are not fitting the bill?”

Interview 4: Gordon

Profile. Gordon is a 41-50 year old teacher who identifies as mixed race. In terms of his teaching career, he is less “traditional” because he started out in engineering and later got his teacher education from St. Thomas University through the Bush program, for professionals who already hold a master’s degree in another field. He did a “fast track” 18 month program, where he got his master’s degree along with a kindergarten-8th grade teaching license and a science endorsement. He began teaching in 2009 in a nearby district, but got “pink slipped” after his first year due to budget cuts. He then found a job in an elementary school in our district, where he taught elementary education before moving to our building to teach 6th grade reading and math. Outside of school, he is very “handy,” and keeps quite busy with side jobs, like taking care of houses for “snowbirds” in his neighborhood and doing remodeling projects. He is married and has a daughter in college and a son who is a senior in high school, as well as three dogs.

Union knowledge/experience. Gordon said that because he does not invest any time into educating himself on what is happening within teachers unions at the local,

state, or national level, his knowledge of union work is below average. Before the *Janus* decision came down, Gordon paid Fair Share fees only, and was not a full dues-paying member of the teachers union, so he did not invest much of his time in union activities in the past. Now that Fair Share fees do not exist, he has become a non-member, so he does not plan to invest time or energy into union activities in the future either.

Personal beliefs about teachers unions. In response to the question, "What were your reasons for being a Fair Share fee payer?" Gordon told me, "Quite honestly, to be a new teacher and to be a union member kind of contradicts your career completely because the unions are out for the older teacher to help them, and the first person they're going to sacrifice is the younger teacher, so I had no willingness to at all participate in something like that." He said as a new teacher he saw the union protect the job of an ineffective teacher in his building who did not serve students well and was "very toxic" to the other people around her, and this validated his decision not to be a full dues-paying member. He also told me he did not want to join the union because he believes it is there to protect teacher privilege based on age only, and not based on merit or any other quality. "They're not looking at, 'Hey this person is a transformational teacher.' They don't care where you're at with your kids. It's all on the time," he said. In Gordon's mind, this issue essentially negates anything else that is good that the unions do, and shows that they don't work for the best interests of students.

Following the *Janus* decision, Gordon said he knew there were risks to becoming a non-member, but decided to become one anyway. He said the biggest risk he is taking is in becoming a non-member is giving up the ability to have legal representation from the

union if something were to happen and he were to find himself in a situation where he was being accused of saying or doing something unacceptable. “There is maybe some worth to that, especially now. Especially with the ‘Me too’ movement, the ‘Black Lives Matter’ movement, you know all sorts of stuff comes up, right, wrong, or indifferent. People have to defend themselves on stuff they may or may not have done, and then they have to prove that they’re innocent,” he said. He told me he thought about what he would do if he found himself in such a situation, and said he would probably just leave teaching, or possibly secure his own legal representation. He acknowledged, however, that for someone younger and newer to teaching, that may not be a viable option.

Gordon also questions whether or not the union serves teachers well on issues like pay structures and benefits. He pointed specifically to something in our district known as the “sick leave pool,” where all employees donate one sick day to be used in a pool for teachers who find themselves in situations where they need extra sick leave. “You know, why do we give a vacation day out for a person that gets hurt where they should have long-term and short-term disability kick in, but yet I lose a day every year? And I don’t have a voice on that. It was just something the union decided for us,” he said. He also said he felt like the union could be doing a better job negotiating teacher pay and salaries for teachers. “If you had a union that represented you, you’d think that the union would be pulling out the worth of what that individual was,” he said.

When I asked Gordon whether or not he foresaw himself joining the union in the future, he said “Not on my immediate horizon, no.” He expressed dissatisfaction with how “tricky” the union makes it for people to leave. He said that he “opted out” of the

union in the fall, and was only able to do so within a two week-long window of time. He also said that in most companies, you only have to opt out once, but the teachers union requires it every year, which he doesn't appreciate. Nevertheless, he still plans to opt out every year if he has to.

Gordon also shared with me that his first experiences with unions were actually not teaching unions, but private sector unions, and those experiences have colored his beliefs about teachers unions and unions in general. "My cousins who own a big business have dealt with the unions...and I've helped them with the unions, so there's many opportunities I've had with unions" he said. These experiences, he told me, sometimes make it hard to separate what he knows about unions from his past with what he experiences with teachers unions.

Barriers to union engagement and areas for reform. Because Gordon has no intention to join or engage in the union at this point, his "barriers" to union engagement are much deeper and more complicated than those mentioned in previous interviews. His reasons for not joining the union, as mentioned above, are mostly ideological. Unions would have to change the way they do business on several levels, therefore, before he would begin to consider becoming a member in the future.

Gordon said that one way he believes unions should reform is to change their focus from teacher seniority to teacher effectiveness. If the union fought for its members based on their teaching abilities and not their years of experience, he argued, then the system would be better for students and teachers alike. In addition, he feels like the union should be investing more time and resources into newer teachers. He gave the example of

having to go through student teaching with no pay, and the fact that in almost every other profession someone investing that much time and energy would at least get a small amount of compensation. He wondered whether or not the union was advocating for student teachers and argued that they should.

Gordon also lamented the fact that, in a variety of ways, but especially in pay, teachers are not treated as professionals, and that people with similar levels of education and experience in other lines of work tend to be paid much more. He pointed to Saturday school, which is something that our district does three times per trimester, and the fact that teachers who choose to participate in them are not paid time-and-a-half for working outside their regular hours. “Somehow education says ‘Your time isn’t worth anything so your Saturdays are only your time, not time-and-a-half, because you’re not as valued. You’re not as professional as other groups,” he said. He did not specifically mention the union with regards to this issue, but I got the sense that he believes the union should be doing more to get teachers the respect and professional treatment he feels they deserve, especially when it comes to compensation.

Final Thoughts on Semi-Structured Interviews

After conducting the four semi-structured interviews, I was reminded that surveys only scratch the surface of an educator’s beliefs, and while two educators may give similar survey responses, their underlying opinions may be vastly different. I felt extremely privileged that these four individuals gave me the opportunity to delve so deeply into their personal stories and ideologies around unionism, and was awed by how diverse their opinions and experiences were. It was also interesting to see how their

responses informed survey data, and helped me get a better understanding of why, perhaps, certain trends emerged in the data. For example, after seeing in survey results that building union meetings were by far the most commonly selected form of union engagement among educators, and then interviewing both Jenny and Michelle, I came to view the role of building union representatives very differently. In different ways, both Jenny and Michelle shared that they felt there was significant room for union reform at the "grassroots"/building level, and that they would engage more and/or feel more connected to their union if there were more building union meetings and direct communication around union work in our building. I now realize that union leaders within our building have a great opportunity, and could probably greatly improve union engagement if they focus more specifically on building union meetings and communication.

Like the survey portion of my results, interviews also left me with many more questions. Specifically, questions about whose perspectives were left out. If I had had unlimited time, I would have loved to interview more individuals, especially more educators who identify as BIPOC, more new union members, and more educators who are non-union members. I will keep these lingering questions in my mind for the future.

Summary

In this chapter, I explained in detail the results of my study, which was designed in order to answer the research question, *How do teachers make decisions around union membership and engagement in my middle school setting?* First, I shared the results of phase one of data collection: the survey. This portion consisted of ten sections of

questions and was completed electronically by 32 teachers who work in my building. Second, I shared the results of the second phase of data collection: the semi-structured interviews. Here, I detailed the thoughts shared by four interviewees selected from the original pool of survey respondents in response to my questions about union membership, engagement, and union attitudes and beliefs.

In chapter five I will share the major ideas and lessons that I learned throughout the process of conducting research, and the overall themes that came through in my results. I will also discuss possible implications of the results, limitations to the study, and ideas for future scholarship.

CHAPTER 5

Conclusion

Chapter Overview

In this final chapter, I summarize the major takeaways of my research and the lessons I learned throughout the process of the capstone thesis. I start by discussing the most prominent findings that emerged within survey data, and possibilities as to how they might answer the research question, *How do teachers make decisions around union membership and engagement in my middle school setting?* I share about the limitations of the survey portion of the study, and then go on to discuss the semi-structured interviews, and how the ideas brought up by interviewees both inform the research question and fit within the context of survey data. Finally, I go on to discuss interview limitations, and return to the research question to share how my findings help me begin to form an answer. I also discuss lingering questions that still remain to be answered, and next steps that could be taken in future scholarship. Additionally, I discuss ways that the process of conducting capstone research shaped me as a union member and learner, and my hopes for the future.

Discussion of Survey Findings

A Note About Demographic Data

After reviewing the demographic data collected in the survey and comparing it with statewide demographic data, I thought it was worth noting a few similarities and differences. In terms of gender, teachers in my building were within about 13 percentage

points of statewide numbers. While 75.8% of teachers in the state of Minnesota identified as female (n=48,053) and 24.2% (n=15,383) identified as male, 62.5% of the teachers I surveyed identified as female (n=20), while 37.5% (n=12) of the teachers I surveyed identified as male. In addition, 95% (n=60,229) of teachers in the state were returning teachers, and 3.8% (n=2,392) were newly licensed teachers, while 93.8% (n=30) of teachers I surveyed were returning teachers and 6.3% (n=2) were newly licensed teachers.

In terms of race, 95.7% of the teachers in the state of Minnesota identified as Caucasian (n=60,691), while 1.5% (n=951) identified as Asian, 1.4% (n=875) identified as African American, 1% (n=634) identified as Hispanic, and 0.4% (n=285) identified as American Indian, adding up to about 4.3% of the 63,436 teachers in the state (n=2,745) identifying as Black or Indigenous People of Color (BIPOC). Among the teachers I surveyed, however, 78.1% identified as Caucasian, while 18.75% (n=6) identified as BIPOC and 3.1% (n=1) chose not to disclose their race. The sample of educators I surveyed, therefore, proved more diverse than the population of educators within the state.

Major Survey Themes

After analyzing the results of the survey portion of this study, a few major themes stand out. First, as educators' ages and years of experience increased, in most cases, so did their knowledge of union work/services and likelihood of being full dues-paying union members. Also, and perhaps less surprising, survey evidence suggested that older and more experienced educators were more likely to have held a union leadership

position than younger or less experienced educators. On the flipside, younger and less experienced educators reported higher numbers of individuals who had not been union members in the past because they were not teaching or were not teaching in a district with a union, and higher numbers of educators who were unsure of their union membership status. Younger and less experienced educators also reported that they would change their union membership status going forward, both to full dues-paying union members and to non-members, at higher rates than did their older and more experienced colleagues, while older and more experienced educators were more likely to maintain their current union status.

When looking at knowledge of union work/services and union membership results through the lens of participants' racial identification, other significant trends emerged. Survey data revealed that educators who identified as Caucasian reported higher percentages in terms of knowledge of union work/services and higher percentages of members who were full dues-paying members, both in the past and going into the future. Educators who identified as Caucasian were also the only group wherein there were individuals who were unsure of their current union status, and the only group to have an individual choose to pay full union dues minus the cost of political spending. Individuals who identified as BIPOC or chose not to disclose race, on the other hand, were the only group wherein an individual reported having paid Fair Share fees in the past. By percentage, educators who identified as BIPOC or chose not to disclose their race were also more likely than those identifying as Caucasian to change their union membership status to become non-members in the future. Additionally, they were more likely to

change their union status to become union members in the future, but only slightly. Thus, there was more membership variability in future membership status within the BIPOC group than within the Caucasian group.

After looking at past and present union engagement for the whole group, it was clear that certain types of union events were most popular among members. Building union meetings and union-sponsored professional developments were the most commonly reported events that educators had attended in the past, as well as the most commonly reported events that educators said they would attend in the future. Union events with the lowest past and future engagement scores were union-related political activities and union leadership/governing events. While it is clear that future union engagement scores increased over past union engagement scores within the large group, engagement trends around educators' ages and years of experience were somewhat inconsistent. It is clear, however, that average union engagement scores increased from past to future at the highest rates among the two youngest groups of educators, and that older and more experienced educators were more likely to show a decrease in union engagement scores from past to future. My study's findings on past and future union engagement contrasted somewhat with the results of Pogodzinski and Jones (2014), which found that veteran teachers were overall more actively engaged with the union than novice teachers. Looking at race, one interesting trend did become clear: Educators who identified as BIPOC or chose not to disclose their race, by percentage, reported higher past and future union engagement averages than did educators who identified as Caucasian.

After analyzing barriers to union engagement, it was clear that family and personal commitments were the most common barrier within all subgroups. For certain age and experience groups, however, educators also cited other barriers equally as often as they cited family and personal commitments. For educators with 6-10 years of experience and educators aged 41-50 years old, workload was the other equally cited barrier, while for the youngest group of educators (those aged 21-30 years old), it was the feeling "I do not want to spend more of my time thinking about school." Significantly, educators who identified as BIPOC or chose not to disclose race also selected "Other" as their top barrier to union engagement, begging an important question: What other barriers to union engagement stand in the way of BIPOC educators/those who chose not to disclose their race?

Looking more closely at former Fair Share fee payers/non-members and union members who indicated they would not renew their membership into the future, it was difficult to draw any major conclusions, given the very small group numbers. Survey data revealed that, in general, their reasons for not being union members or leaving the union in the future were either based on money, ideology, or some combination of both. Two of the three individuals cited steep union dues as a deterrent to joining the union, and two of the three individuals cited feelings that the benefits of joining the teachers union were not worth the costs. Other ideological reasons given by an educator for becoming a non-member were feelings that teachers unions were ineffective and that they personally disagreed with union political activities. Another non-member also cited a negative experience with a union leader as having steered him away from the union.

Interestingly, in all three cases, non-members/future non-members were male and within their first zero to ten years of teaching. One of them identified as Caucasian, while another identified as having two or more races and another chose not to disclose his race.

These findings made me think back to some previous studies outlined in the Literature Review Chapter, including the study of "inactive" vs. "active" union members by Popiel (2013), which found that some educators who identified themselves as "inactive" in the union had had negative experiences with union members that deterred them from union engagement. In addition, Popiel's study showed that some "inactive" educators felt their union lacked "moral legitimacy," and a sense that the union's values were inconsistent with their own. These findings seemed consistent with my own survey findings. I also thought back to the 2018 *Educators for Excellence Survey*, which revealed that of the teachers surveyed, 54 percent of union members and 72 percent of non-members indicated that they believed the cost of union membership was higher than warranted, and almost one in five educators said they would opt out of union membership if given the chance. While I did identify some educators who did not feel union membership was worth the costs and had either already opted out of union membership or planned to do so in the future, the numbers in my case were lower: less than one in ten.

Because I had approached this project with certain expectations around union members and their beliefs, I found results of the "Union Attitudes and Beliefs" section especially interesting. As I had suspected would happen, educators' feelings of favorability toward teachers unions appeared to increase with both age and years of experience. When looking at race, however, I was initially somewhat surprised to see that

educators who identified as Caucasian showed higher feelings of favorability toward teachers unions than did educators who identified as BIPOC or chose not to disclose their race. Upon greater reflection, however, I realized that these results actually fit within the frame of other survey results for educators who identified as BIPOC or chose not to disclose their race. Overall, these results suggested that individuals within this group were less likely to be union members and more likely to change their union membership status, and that they also engage with unions somewhat differently than do educators who identify as Caucasian. Lower levels of union favorability might, perhaps, begin to explain some of these other findings.

When it came to the question, "Under what climate/conditions do school districts and unions work together most productively?" I was not especially surprised to learn that older and more experienced educators selected "In a collaborative labor management environment" at higher rates than younger, less experienced teachers. Because collaboration seems to be the overall approach embraced within our district, I had hypothesized that educators with greater union knowledge and/or a longer history of union activity would also favor this approach. Looking at the issue through the lens of race, however, left me with some new questions. Educators who identified as caucasian significantly favored the collaborative approach (N=20 out of 25 participants, 62.5%), while only three out of 32 Caucasian educators chose "Unsure" (9.4%), one out of 32 Caucasian educators chose "In a competitive business environment," and one out of 32 Caucasian educators chose "Other." While a majority of the educators who identified as BIPOC or chose not to disclose their race did also select "In a collaborative labor

management environment" (42.9%, N=3 out of 7 participants), this group also chose "In a competitive business environment" (28.6%, N=2 out of 7 participants) and "Unsure" (42.9%, N=2) at significantly higher percentages than did educators who identified as Caucasian. That the percentage of members within this group who favored the competitive model were so much higher than Caucasian educators who favored the same model was interesting to me. Again, I found myself with more questions regarding BIPOC educators' union beliefs than answers.

I continued adding to my list of unanswered questions and identified other interesting trends after analyzing the results of the final survey question. The question asked participants to complete the sentence "Teacher unions would be better if…" by selecting among five different answers. Participants' answers, overall, showed that most educators in my building believe the union would be better if it focused on racial equity, reforming the teacher evaluation and tenure systems, and improving professional development. Looking at results by years of experience, it was interesting to see how each group's top priorities seemed to be different. After looking at educators' answers by age group, however, it was clear that "Option 4: They focused more on racial equity," was a top priority for most age groups, though the percentage of educators who selected this option diminished as age group went up, and within the oldest group of educators, it was not even among the most commonly chosen answers. I also found it interesting that this choice was overwhelmingly selected by educators who identified as Caucasian, while educators who identified as BIPOC or chose not to disclose their race, on the other hand, did not select it as a top answer. These results made me think back to the article on the

Providence, RI teachers union by Asher Lehrer-Small (2020), and how many educators interviewed, both BIPOC and Caucasian, felt a need for the union to actively work toward racial equity. I thought it was very interesting how this finding was only confirmed among Caucasian educators within my own study. The answers most commonly selected by educators who identified as BIPOC or chose not to disclose their race seemed to be "Option 1: They offered better professional development opportunities," and "Option 5: Other." That this group selected "Other" at such a high percentage (42.9%, N=3 out of 7 participants) was, to me, perhaps the most interesting finding, begging the question "What would educators who identified as BIPOC and those who chose not to disclose race have written for 'other' if given the chance?"

Survey Limitations

Several factors may have limited my ability to gather sufficient, clear, and/or meaningful data from the survey portion of this study. First, issues with wording and technical errors within parts of the survey made it difficult to interpret certain results. Within some sections of the survey, I could tell that the wording of the question produced confusion over which participants should answer, and led to some participants answering in questions that were not intended for individuals with their membership status, or failing to answer questions intended for individuals with their membership status. For example, in a set of questions aimed at new educators who were in their first year teaching or had previously taught in a district without a union, it was clear that there were participants who should have responded that did not, as well as participants who responded that were in fact returning teachers. This led to incorrect data, missing data

and, in some cases, redundancies. For this reason, there was a section of survey results where I omitted certain questions from the results section, and chose not to analyze their data. In addition, there were several sections of the survey where participants were given the option to select "other," and I tried to set up the survey in such a way that would allow participants who chose this option the ability to type in their own unique answer. Due to my own technical shortcomings, however, this only worked for one of the questions with the "other" option, leaving me extremely curious about what participants would have written in many cases.

Perhaps the most significant limiting factor in this study was small sample size. Only 32 educators within my middle school building chose to participate, and while with 42.6% of the roughly 75 licensed teachers in my building, this was a sizable percentage, I had hoped more of my colleagues would participate. I knew that with such a limited sample, participant subgroups would likely be too small to meaningfully interpret trends within the data, or to generalize results to larger populations of teachers in the district or state. For this reason, I have chosen not to interpret my results as indicative of larger trends in the field of education, but merely my own participant pool. While this type of data interpretation is somewhat limited in that it prevents me from identifying any widely significant findings, it has led me to some important new hypotheses and questions for future research.

Discussion of Interview Findings

Conducting semi-structured interviews, was, without a doubt, my favorite part of the research experience. Not only was it extremely interesting to be able to talk with my

peers about their opinions and experiences, but it was fascinating to see the vast array of different beliefs and opinions represented, and the ways participants were able to speak specifically to many findings uncovered in the survey portion of my study. What's more, in many instances, interviewees brought up thoughts and experiences that I had never before considered in relation to the research question, and tapped into answers that the survey portion of this study never covered. I am extremely grateful to the four individuals who were generous enough to share their time, opinions, and experiences, and feel that their perspectives helped me significantly in beginning to form a working answer to my research question.

Major Interview Themes

After analyzing the interview data, I identified ten major themes that I felt were especially informative with regards to the research question, *How do teachers make decisions around union membership and engagement in my middle school setting?* These themes are summarized below.

1. Educators seem to hold either a collective, team-oriented view of the union or a more removed, bureaucratic view of the union. Throughout the course of my interviews, I saw two competing ideas about unionism emerge within the ideas of the four educators: On one side, Jenny, Ahmed, and Michelle all brought up the idea that joining the union contributes to its strength, and adds to the collective power of teachers. What's more, they expressed a sense of efficacy that comes from taking ownership in it, seemingly espousing the idea that they themselves were the union, and the more they invested in it, the more they would get out of it. On the other side, however, Gordon, and

at one point also Michelle, seemed to express ideas that the union felt removed, bureaucratic, and not representative of their own interests or beliefs. I found it especially interesting that when asked about ways he thought the union should reform, Gordon brought up qualms about teacher pay, benefits, and the overall sense of professionalism afforded to teachers, expressing that unions were perhaps not adequately negotiating these items on teachers' behalf. I got the sense that he saw the union as an outside entity making decisions for him, rather than an inclusive entity that he could actually shape and work with if he wanted to affect change. This surprised me because, as I learned in writing my literature review, teachers' pay, benefits, and professionalism are the essential reasons why teachers started unions in the first place, and it seems that unions have only helped improve things in those regards. I never expected educators to view unions as the source of the problem rather than the means to a solution, but now that I see that this may be the mentality of many educators. I also saw that some educators, like Michelle, seemed to hold a mix of both views, leaning more to the collective, team-oriented view of unionism on most issues, but adopting the more removed, bureaucratic view on others.

2. Family ties play an important role in educators' feelings about unions. I also found within more than one of my interviews that loyalty to unions, or lack thereof, was something that could be traced back to educators' family members. In the case of both Jenny and Michelle, loyalty to unions had been instilled in them outside of their role in education thanks to a family member or family members in other lines of work who were also union members. Michelle shared about her family's experience, and seemed to carry on union loyalty because she had seen the value of the union through her father's

eyes. In the case of Gordon, however, the opposite situation applied, and his family members' negative experiences with unions shaped his decision to become a non-member. This overall trend of educators being able to trace their union loyalty (or disloyalty) back to family members was an interesting new finding that I would not have uncovered if not for the interviews.

3. Educators fall within a continuum of beliefs about union political organizing. Survey data showed that while most educators did not have a problem with political organizing, others took issue with it, and the interviews bore these findings out in various ways. In her interview, Jenny shared that she was initially uncomfortable with the level of political activism espoused by the teachers union, but that as she saw union political work in action, she learned to embrace it, believing that the political advocacy side of unionism is essential to accomplishing educators' goals. Ahmed echoed that sentiment in his interview, applauding the fact that educators can come together to influence different levels of government on various issues related to public education. Jenny and Ahmed stood in stark contrast to Gordon on this issue, who mentioned that he disagreed with many of the union's views and thus did not support union political activism. Michelle, on the other hand, seemed to hold a more nuanced view of union political action: While she did not disagree with it, and even said she would be open to a small leadership role in political organizing at the local level, she expressed that union political organizing in some ways tends to disconnect organizers from "grassroots" issues that teachers face on a building and local level. Thus, she felt that the union should perhaps focus less time on political activism and more time on helping educators affect

change “from the ground up.” Her position made me think of Popiel’s study on “inactive” vs. “active” union members (2013), which found that people within both groups valued the sense of political voice that unions give teachers, but that some inactive members felt unrepresented by their local union.

4. Educators are most willing to engage in building-level union meetings. Survey data showed that, both in the past and looking into the future, educators were most likely to engage in building-level union meetings. Both Jenny and Michelle shared that they are happy to attend them because they like to remain informed about union activities and how they affect their work at the building level. Jenny also expressed a wish that our building union representatives would make building union meetings a more common occurrence within our building.

5. Educators are also willing to engage in union-sponsored professional developments. Survey results also showed that after building union meetings, educators were the next most willing to engage in union-sponsored professional development opportunities, and both Jenny and Ahmed spoke to this trend. Both educators shared that they had participated in several union professional development opportunities, and talked about different ways they found them to be valuable. Jenny commented that many union professional development events were literally a good value, and that the union offers the opportunity to attend some excellent training opportunities, as well as provides food and lodging, at an unbeatable cost. Ahmed also shared that he felt professional development opportunities were not only beneficial because they help educators improve their skills,

but they also help instill a deeper sense of community among teachers and reignite their passion for promoting public education.

6. Legal representation is an important union benefit for many educators. While educators were not given a specific opportunity within the survey to opine on this topic, I found in conducting interviews that some educators believe the legal representation provided by the union is extremely valuable. This finding is also consistent with Chapman's 2013 study, which found that among educators who identified themselves as current union members and educators who identified themselves as former union members, many within both groups agreed that the liability insurance offered by the teachers unions was valuable. Both Ahmed and Gordon expressed that in today's world, teachers are finding themselves embroiled in legal conflicts at an increasing rate, and that legal representation sometimes becomes essential for educators in order to protect both their job and their reputation. I found it especially interesting to hear Gordon share this, given the fact that he is not actually a union member. He said that he believes legal representation is the single greatest benefit the union provides, and while he did not value it quite enough to make it worth paying full union dues, he said obtaining legal representation would be the one reason he would ever think about joining.

7. Limited time, personal commitments, workload, and not wanting to think more about school, are some of the biggest barriers to union engagement for educators. Survey results showed that among educators in my building, family/personal commitments, workload, and a feeling of not wanting to spend more time thinking about school were the three biggest barriers to union engagement. Most interviewees talked

about encountering one or more of these barriers in different ways. While Ahmed is undoubtedly more involved in union events than the average union member, he shared that sometimes different things in his personal life or issues with workload get in the way of him attending union events. Similarly, Jenny shared that sometimes the timing of union events conflict with obligations at home, and Michelle shared that she often brings her classroom work home, and doesn't feel she has time to attend union events. These findings made me think back to the 2014 study by Pogodinski and Jones, which found that novice teachers may be less likely to be engaged in union activities due to heavy workload. While my own study also found that workload was a barrier to union engagement, it proved to be a barrier that spanned across experience levels, affecting more than just novice teachers.

8. Many educators believe that unions give undue protection to ineffective teachers, and that does not serve the best interest of students. Survey results showed that many educators believe unions would be better if they did more work to reform teacher evaluation and the tenure system, and two interviewees addressed this issue in-depth. Both Michelle and Gordon talked about having seen ineffective teachers continue on in their jobs when their students were clearly suffering, and wanted to see reform around this issue. While Michelle believes the union certainly plays an important role in this problem, she acknowledged that building administration must also share responsibility, and expressed interest in improving the way districts and unions communicate in their handling of teacher tenure and evaluation. After talking about this issue with Gordon, however, I got the sense that he saw the problem as more severe and

entrenched. He told me about an experience with a "toxic" ineffective teacher whose job was protected by the union. He said that this teacher continued on year in and year out, despite clear evidence that she was not serving students well, and even got promoted to become an instructional coach in an effort to get her out of the classroom. For him, this issue is at the heart of the reason why he does not want to be a union member, and is a symptom of a larger problem. He believes that the union operates solely on a system of seniority, placing little to no value on teacher merit, and that this makes it especially difficult to remove ineffective teachers from classrooms. Gordon told me that if the union could reform on this issue and change its focus from teacher seniority to teacher merit, then it would, in his eyes, become much more effective for both teachers and students. These findings made me think back to Popiel's 2013 study, outlined in the Literature Review, and the finding that many "active" and "inactive" union members were unhappy with the union's protection of ineffective teachers. An important conclusion within the study was that in order to engage "inactive" members who felt their values were not in alignment with the union's, local union chapters would need to "shift the moral center" of their organizations. Gordon's comments on this issue confirm that within my own organization, a similar moral "shift" would be necessary in order to engage with educators who choose to be non-members.

9. Some educators believe that unions do not always serve new teachers well.

Piggybacking somewhat on the last theme, I learned through the interview process that beneath other concerns, some educators feel that teachers unions do not always serve new teachers well, or at least not as effectively as tenured teachers. Though she believes that

teachers unions do good work and are, in general, worth the costs, Michelle sees this as an issue in some districts (but not necessarily ours). Because the union refused to come to her aid after she was fired unfairly by an administrator as a probationary teacher in a previous district, this negative experience continues to shape her feelings on the issue. She said she sometimes wants to tell teachers in that district that they should not pay union dues until they have tenure. Gordon's feelings that new teachers are not served well by teachers unions go back to his concerns over the teacher tenure and evaluation system. Because he believes that the union is more focused on educator seniority than merit, he feels that the union prioritizes older teachers over newer teachers, and is more likely to "sacrifice" newer teachers before older ones. He also believes that the union should do more to help student teachers, since they are not paid anything for their time in the classroom pre-licensure.

10. Many educators believe that union communication/organization could be more effective. Though survey questions did not probe deep enough to identify this theme, I found from conducting interviews that three out of four interviewees felt the union should reform in terms of its communication and organization system, especially at the local level. Each educator who commented on this issue saw the problem a little bit differently. Jenny felt that our local union's email system should be changed so that all information comes directly through the president and executive board rather than relayed indirectly through building union representatives. She also felt that at the local level, there should be more accountability for building union representatives on things like attending union meetings, building relationships with other members, and communicating

to members in-person, since those things seem to be somewhat neglected within our building. Though he did not get very specific, Ahmed echoed some of the same ideas as Jenny, expressing that the union could do more to get members on "the same page." Approaching the issue from a slightly different angle, Michelle shared that, especially at the local level, she wished the union could change its organization strategy from being more prescriptive and "top-down" to being more focused on the specific needs within each school building. All in all, it seemed that many educators wanted to change the way the local union organizes its meetings and communication so that members would feel more heard, informed, and included in local union operations. These findings made me think back to my Literature Review and the study of Millennials vs. Non-Millennials by Swenson-Chipman (2014), which found that communication issues were a major part of millennials' challenges with union membership and engagement. Results of my own study seemed to confirm that this was not only a problem for millennials, but all generations of educators across the board.

Interview Limitations

As with the survey portion of this study, I feel that the single greatest limitation to the semi-structured interview results was sample size. While I was amazed at how significantly my four interviews enriched my overall data set and gave dimension to my survey findings, I know that conducting more interviews would only have enriched my study further. In addition, there are groups of educators who I feel deserved more of a voice in this work, and I regret that I was not able to complete more interviews with those group members. Specifically, I wish I could have conducted more interviews with new

teachers and educators who were non-union members, because their perspectives were somewhat underrepresented within the interviews. Also, while 50% of the educators I interviewed identified as BIPOC, I would have liked to conduct more interviews with educators of color for multiple reasons. One reason is that the survey portion of my study left me with a long list of questions about how educators who identified as BIPOC or chose not to disclose their race make decisions about union membership and engagement, and I hoped that perhaps more interviews with members of this group would help answer those questions. Another reason why I would have liked to interview more educators who identified as BIPOC is because, with many different races represented under one umbrella, this group is much more culturally diverse than educators who identify as Caucasian, and with cultural diversity comes diversity in opinions and experiences around life, work, and (probably) unionism.

A Return to the Research Question

Going back to my research question, *How do teachers make decisions around union membership and engagement in my middle school setting?* I feel I have the beginning of a working answer. After having completed both a survey and four semi-structured interviews, I now know a lot more about how and why educators in my middle school setting make those decisions. I also know that for each educator, many different layers of experience and identity inform those decisions. Family plays an important role. Race plays an important role. Age plays an important role. Years of teaching experience play an important role. Past experiences with unions play an important role, and, of course, all of the communities, districts, buildings, and previous

work settings an educator has been a part of play an important role in informing educators' decisions around union membership and engagement. Thus, for anyone wishing to affect the way educators view union membership and engagement, these many layers of identity and experience must be given careful consideration. It is also clear that other factors yet unexplored within this Capstone play a role in shaping their views around union membership and engagement. One of these potential factors is explored in the following section.

Lingering Questions

While my scholarship has led me to the beginning of an answer to my research question, many more questions have come to light in the process. Chief among them is a question that sums up many smaller ones that were formed in the course of analyzing survey results: "How do educators who identify as BIPOC or choose not to disclose their race differ from educators who identify as Caucasian when it comes to decisions around union membership and engagement?" I was led to this question after seeing within survey results that educators in my building who identified as BIPOC or chose not to disclose their race seemed to be less likely to be full dues-paying union members and less likely to hold favorable views of teachers unions, but also more likely to engage in union activities than educators who identified as Caucasian, more likely to hold a union leadership role, and more likely to change their union membership status, whether to new member or non-member. In addition, educators who identified as BIPOC or chose not to disclose their race seemed to experience different barriers to union engagement, and to have differing opinions around ways that unions should reform, though some of those precise

barriers and opinions were never defined due to survey issues. Because of the limitations surrounding my research, including extremely small sample size, and because prior research on this precise topic is extremely limited, I believe more scholarship around the way educators who identify as BIPOC or choose not to disclose their race make decisions around union membership and engagement is needed.

Next Steps

While the completion of my Capstone Thesis marks an opportunity to end my scholarship around union membership and engagement, if given the right opportunity I would jump at the chance to continue my scholarship and follow up on my lingering questions around educators who identify as BIPOC or choose not to disclose race. Ideally, I would create a similar survey, but this time with fewer technical glitches, and more opportunities for educators to share personalized responses. I would also ensure that I had much larger sample sizes, and intentionally seek out equal numbers of educators who identify as BIPOC and educators who identify as Caucasian so that I am not questioning whether sample size affected trends in the data. In addition, I would conduct more interviews, again ensuring that the number of BIPOC and Caucasian participants are equal, but also intentionally drawing in more perspectives from new teachers and non-union members, since these educators' perspectives seemed to be underrepresented in my initial data set. Whether or not an opportunity like this will ever be possible for me remains to be seen, but my attitude is: "If I can dream it, then maybe someday I can do it."

Personal Reflections

I first began thinking about this research topic three years ago, in spring of 2018, when I completed the Capstone Practicum course at Hamline University. Since then, much has changed, both personally and within the world around me. I became a mother, was forced to become an online teacher, joined with union members and organizers to demand adequate protections for both teachers and students in the midst of a global pandemic, and temporarily left the workforce as COVID-19 continued to rage. While some of these changes have been more positive than others, all of them have shifted my perspectives on this research project in ways I couldn't have imagined at the beginning. Now, having my own child who will one day be in school, and having been forced into a series of unprecedented situations as an educator, I value and appreciate the roles of both teachers and unions much more profoundly than I did before. I also empathize more with educators who experience barriers to union engagement, take issues of union reform more seriously, and am altogether more aware of the complex, symbiotic relationships that exist between different stakeholders in the world of education.

Getting to see so many other educators' perspectives as part of this Capstone thesis was also extremely enriching to me as both a learner and union member. In many ways, I was able to connect my personal experiences with the union to other educators' experiences, and make new meaning of them. For example, after interviewing my colleagues, I came to view the role of building union representative (a role I once held) very differently, and got several new ideas for how to promote union engagement within my building. I also saw how many different layers of experience and identity inform

educators' choices around union membership and engagement, and came to better appreciate the vastly different perspectives I encountered from one educator to another. In addition, I realized that educators who identify as BIPOC seem to have very different experiences and views around teachers unions than do educators who identify as Caucasian, and became interested in studying these differences in greater depth.

I expect that the world of education will continue to evolve quickly in this tumultuous time, and am confident that teachers unions will continue to be an important part of those changes now and into the future. With so much at stake, educators must continue to lean on their greatest resource: each other. I hope that in sharing the thoughts and experiences of my colleagues, we can continue working to strengthen that resource together.

REFERENCES

AFT. (n.d.). *History.* Retrieved from: https://www.aft.org/about/history

AFT. (n.d.). *Join the AFT-Associate Membership.* Retrieved from https://www.aft.org/join-aft#:~:text=As%20a%20National%20Associate%20Member,and%20nurses%20and%20other%20healthcare

Antonucci, M. (2010). The long reach of teachers unions. *Education Next*, 10(4), 24-31.

Antonucci, M. (2020, January 28). Union report: New year, same old decline in union membership. But the teachers unions are still big fish in a shrinking pond. *The 74 Million.* https://www.the74million.org/article/union-report-new-year-same-old-decline-in-union-membership-but-the-teachers-unions-are-still-big-fish-in-a-shrinking-pond/

Antonucci, M. (2020, February 5). Union report: Will NEA and AFT ever merge? They last tried in 1998. Things are much different now. *The 74 Million.* Retrieved from https://www.the74million.org/article/union-report-will-nea-and-aft-ever-merge-they-last-tried-in-1998-things-are-much-different-now/#:~:text=Teachers%20union%20locals%20in%20Los,North%20Dakota%20are%20also%20merged.

Barnum, M. (2019). (2019, April 15). *Are teachers unions helping or hurting schools?*

Here's what the newest research tells us. Chalkbeat. https://www.chalkbeat.org/2019/4/15/21107924/are-teachers-unions-helping-or-hurting-schools-here-s-what-the-newest-research-tells-us

Baron, J. (2018). The Effect of Teachers' Unions on Student Achievement: Evidence from Wisconsin's Act 10. Retrieved from https://papers.ssrn.com/sol3 papers.cfm?abstract_id=3001417

Bascia, N., and Osmond, P. (2012). Teacher unions and educational reform: A research review. National Education Association Center for Great Public Schools. https://www.researchgate.net/profile/Pamela-Osmond-Johnson/publication/325483121_Teacher_Unions_and_Educational_Reform_A_Research_Review/links/5b109f924585150a0a5e14e3/Teacher-Unions-and-Educational-Reform-A-Research-Review.pdf

Center for Responsive Politics. (n.d.). *American Federation of Teachers.* OpenSecrets.org. https://www.opensecrets.org/orgs/american-federation-of-teachers/summary?all=2020&id=D000000083

Center for Responsive Politics. (n.d.). *National Education Assn.* OpenSecrets.org. https://www.opensecrets.org/orgs/national-education-assn/summary?id=D000000064

Center for Responsive Politics. (n.d.). *Teachers Unions.* OpenSecrets.org. https://www.opensecrets.org/industries/indus.php?cycle=2020&ind=l1300

Chapman, S. L. (2013). *Teachers' perceptions regarding the value of a local teacher union* (Doctoral dissertation). Retrieved from Proquest Dissertations and Theses Global. (3608069)

Cowen, J.M. (2009). Teacher Unions and Teacher Compensation: New Evidence for the Impact of Bargaining. *Journal of Education Finance,* 35(2), 172-193.

Crabtree, P. (2016). *Changing perspectives on teachers' unions.* Retrieved from https://www.edweek.org/tm/articles/2016/04/01/changing-perspectives-on-teachers-unions.html

Creswell, J.W. (2014). *Research Design (4th ed.).* Thousand Oaks, CA: SAGE Publications.

Dupuy, B. (2018, February 3). More Minnesota teachers leaving jobs, new state report shows. *StarTribune.* https://www.startribune.com/more-minnesota-teachers-leaving-jobs-new-state-report-shows/412565693/#:~:text=A%20newly%20released%20Minnesota%20Department,are%20increasingly%20leaving%20the%20profession.&text=The%202017%20version%20of%20the,leaving%20the%20profession%20since%202008.

Economic Policy Institute. (2016). The teacher pay gap is wider than ever: Teachers' pay continues to fall further behind pay of comparable workers. Washington, D.C.: Allegretto, S. & Mishel, L. Retrieved from https://www.epi.org/publication/the-teacher-pay-gap-is-wider-than-ever-teachers-pay-continues-to-fall-further-behind-pay-of-comparable-workers/

Education Minnesota. (2016). Celebrate labor history month. *Minnesota Educator.* Retrieved from https://www.educationminnesota.org/news/minnesota-educator/2016-17/0517/Celebrate-Labor-History-Month

Education Minnesota & The Labor Education Service at the University of Minnesota.

(2018, August 23). *Our shared legacy.* [Video]. Youtube. https://www.youtube.com/watch?v=WjkdK238ZbM

Educators for Excellence. (2018). *Voices from the classroom: A survey of America's educators.* https://e4e.org/sites/default/files/2018_voices_from_the_classroom_teacher_survey.pdf

Hoxby, C. (1996). How teachers' unions affect education production. *The Quarterly Journal of Economics,* 111(3), 671-718.

Howe, A. (2018, February 20). *Argument preview: For the third time, justices take on union-fee issue.* [Web log comment]. Retrieved from http://www.scotusblog.com/2018/02/argument-preview-third-time-justices-take-union-fee-issue/

Ingraham, C. (2018, January 19). Union membership remained steady in 2017. The trend may not hold. *The Washington Post.* Retrieved from https://www.washingtonpost.com/news/wonk/wp/2018/01/19/union-membership-remained-steady-in-2017-the-trend-may-not-hold/?utm_term=.f953c525c2e3

Intelligence Squared Debates. (2010). *Don't blame teachers unions for our failing schools.* Retrieved from https://www.intelligencesquaredus.org/debates/dont-Blame-teachers-unions-our-failing-schools

Janus vs. American Federation of State, County, and Municipal Employees Council 31. 585 U.S. 13-14, 1, 24(2018). https://www.supremecourt.gov/opinions/17pdf/16-1466_2b3j.pdf

Johnson, R.B., Onwuegbuzie, A.J., & Turner, L.A. (2007). Toward a definition of Mixed

methods research. *Journal of Mixed Methods Research,* Volume 1(2), 112-133.

Kahlenberg, R.D. (2017). Why teachers should lead education reform. *The Century Foundation.* Retrieved from https://tcf.org/content/commentary/teachers-lead-education-reform/

Koppich, J. (2012). Teacher unions 101. *Educational Horizons, 90(4), 10-13.*

Lehrer-Small, A. (2020, November 30). A test case in Providence: Can majority-white teachers unions be anti-racist? *The 74 Million.* https://www.the74million.org/article/a-test-case-in-providence-can-majority-white-teachers-unions-be-anti-racist/

Leroux, K. (2007) The National Education Association. In *Encyclopedia of U.S. Labor and Working Class History.* (Vol. 1, pp. 952-956). New York: Taylor & Francis Group. Retrieved from https://edisciplinas.usp.br/pluginfile.php/159608/mod_resource/content/1/U_S__Labor_and_Working_Class_History__3_Vol_set.pdf

Lyons, J.F. (2007). The American Federation of Teachers. In *Encyclopedia of U.S. Labor and Working Class History.* (Vol. 1, pp. 87-90). New York: Taylor & Francis Group. Retrieved from https://edisciplinas.usp.br/pluginfile.php/159608/mod_resource/content/1/U_S__Labor_and_Working_Class_History__3_Vol_set.pdf

Madland, D., and Rowell, A. (2017, November 15). *Attacks on public-sector unions harm states: How Act 10 has affected education in Wisconsin.* Center for American Progress Action Fund. https://www.americanprogressaction.org/issues/economy/reports/2017/11/15/169146/attacks-public-sector-unions-harm-states-act-10-affected-education-wisconsin/

Mader, J. (2012). The rise of teacher unions: A look at union impact over the years. [Web log comment]. Retrieved from http://hechingered.org/content/the-rise-of-teacher-unions-a-look-at-union-impact-over-the-years_5601/

Manzo, F., & Bruno, R. (2018, May 9). *After Janus: The impending effects on public sector workers from a decision against fair share.* The Illinois Economic Policy Institute. https://illinoisepi.files.wordpress.com/2018/05/ilepi-pmcr-after-janus-final.pdf

Marianno, B., & Strunk, K. (2018). After Janus. *Education Next.* Retrieved April 15, 2021 from https://www.educationnext.org/after-janus-new-era-teachers-union-activism-agency-fees/

Mertz, A. (n.d.). *A century of teacher organizing: What can we learn?* Retrieved from: https://www.lawcha.org/century-teaching-organizing/

Minnesota Department of Education. (2018). *Minnesota Report Card.* [Data file]. Retrieved from http://rc.education.state.mn.us/#demographics/orgId--999999000000__groupType--state__p--1/orgId--10279000000__groupType--district__p--3`

Minnesota Professional Educator Licensing and Standards Board. (2019). *2019 biennial Minnesota teacher supply and demand.* https://mn.gov/pelsb/assets/2019%20Supply%20and%20Demand%20Report_tcm1113-370206.pdf

Mooney Institute for Teacher and Union Leadership. (2005). [Graphic organizer of the

three frames of unionism]. *Constructing 'progressive unionism' out of three frames.* http://mceanea.org/wp-content/uploads/sites/12/2014/05/2.1-aMITUL-Three-Frames-of-Unionsm-v5.0.pdf

National Labor Relations Board. (n.d.). *The 1935 passage of the Wagner Act.* Retrieved from https://www.nlrb.gov/who-we-are/our-history/1935-passage-wagner-act

NEA. (n.d.). *Our history.* Retrieved from http://www.nea.org/home/1704.htm

NEA. (n.d.). *Students, educators, workers, allies-- we all have a home in our union.* Retrieved from https://www.nea.org/about-nea/our-members

Noonan, J.M. (2016, January 13). False perceptions and the future of teachers unions [web log comment]. Retrieved from https://scholar.harvard.edu/jmnoonan/blog/false-perceptions-and-future-direction-teachers-unions

NPR News. (2010, October 19). The role of teachers' unions in education. *Talk of the nation.* Podcast retrieved from https://www.npr.org/templates/story/story.php?storyId=130675529

Pogodzinski, B., & Jones, N. (2014). Exploring Novice Teachers' Attitudes and Behaviors Regarding Teacher Unionism. *Educational Policy, 28*(4), 491-515.

Popiel, K. (2013). Teacher union legitimacy: Shifting the moral center for member engagement. *Journal of Educational Change,* 14, 465-500.

Posnick-Goodwin, S. (2011). Q & A: A teacher/producer speaks from experience. *California Educator,* 16(2) 24.

Ravitch, D. (2006). Why teachers unions are good for teachers--and the public. *American*

Educator, Winter 2006-2007. Retrieved from https://www.aft.org/periodical/american-educator/winter-2006-2007/Why-teacher-unions-are-good-teachers-and

Riches, J. (2018). Union time on taxpayers' dime. *National Review.* Retrieved from: https://www.nationalreview.com/2018/03/new-jersey-teachers-release-time-waste-taxpayer-money-court-challenge/

Smith, P. (2012). Resistance! Do Teachers Dare to Strike and Insist Upon Collective Bargaining in this Neoliberal Age? *Educational Studies,* (48) 499-500. DOI: 10.1080/00131946.2012.733280

Smith, W. (2013). Framing the debate over teacher unions. *Mid-Atlantic Education Review,* 1(1), 2-17.

Strauss, V. (2018, July 3). A new public education movement is emerging in Wisconsin, a rebuke to Gov. Walker's war on labor and school privatization. *The Washington Post.* Retrieved from https://www.washingtonpost.com/news/answer-sheet/wp/2018/07/03/a-new-public-education-movement-is-emerging-in-wisconsin-a-rebuke-to-gov-walkers-war-on-labor-and-school-privatization/

Strauss, V. (2014, March 25). Why teachers' salaries should be doubled--now. *The Washington Post.* Retrieved from https://www.washingtonpost.com/news/answer-sheet/wp/2014/03/25/why-teachers-salaries-should-be-doubled-now/?utm_term=.97f0932b85df

Swalwell, K., Schweber, S., Sinclair, K., Gallagher, J., & Schirmer, E. (2017). In the aftermath of Act 10: The changed state of teaching in a changed state. *Peabody Journal of Education,* 92(4), 486-504. DOI: 10.1080/0161956X.2017.1349485

Swenson-Chipman, H. (2014). *Does today's teacher union fit tomorrow's educator? Perspectives from millennials.* Retrieved from Proquest Dissertations and Theses Global. (3582090)

The Education Policy Center at Michigan State University. (2014). *Working paper #42: How do teachers' unions influence education policy? What we know and what we need to learn.* East Lansing, MI: Cowen, J. & Strunk, K.O. Retrieved from http://education.msu.edu/epc/library/documents/wp%2042%20how%20do%20teachers%20unions%20influence%20education%20policy.pdf

The Learning Policy Institute. (2016). *A Coming Crisis in Teaching? Teacher Supply, Demand, and Shortages in the U.S.* Palo Alto, CA: Sutcher, L., Darling-Hammond, L., & Carver-Thomas, D. https://learningpolicyinstitute.org/sites/default/files/product-files/A_Coming_Crisis_in_Teaching_REPORT.pdf

Toppo, G. & Overberg, P. (2015). Fewer than half of teachers now covered by unions. *USA Today*. Retrieved from https://www.usatoday.com/story/news/nation/2015/02/10/teacher-unions-fewer-half/23195433/

Totenberg, N. (2018, February 26). Supreme court hears fiery arguments in case that could gut public sector unions. *All things considered podcast.* Podcast retrieved From https://www.npr.org/2018/02/01/582539884/supreme-court-could-bleed-unions-dry

Turner, C. (2018, April 11). *Walkouts and teacher pay: How did we get here?* NPR.

https://www.npr.org/sections/ed/2018/04/11/600832090/walkouts-and-teacher-pay-how-did-we-get-here

Urban, W. J. (2007). Higher education and the National Education Association: A sesquicentennial review. *The NEA 2006 Almanac of Higher Education,* pp. 27-40.

Webb, E. J., Campbell, D. T., Schwartz, R. D., & Sechrest, L. (1966). Unobtrusive measures. Chicago: Rand McNally.

Winkler, A.M., Scull, J., & Zeehandelaar, D. (2012). *How strong are U.S. teachers unions? A state-by-state comparison.* The Thomas Fordham Institute. http://edex.s3-us-west-2.amazonaws.com/publication/pdfs/20121029-Union-Strength-Full-Report_7_0.pdf

Wong, A. (2019, January 22). America's teachers are furious. *The Atlantic.* https://www.theatlantic.com/education/archive/2019/01/teachers-are-launching-a-rebellion/580975/

Yusim, S.E. (2008). *Teacher unionism: Past, present, and future: A study to determine the future of union involvement in school reform* (Doctoral Dissertation). Retrieved from ProQuest Dissertations and Theses Global. (3335144)

Appendix A: 3 Frames of Unionism Graphic Organizer

For a visual representation of the three frames of unionism (Mooney Institute for Teacher and Union Leadership, 2005), see images below:

Graphic Organizer Page 1

Constructing "Progressive Unionism" Out of Three Frames

MITUL Cohort Draft 5.0—Work in Progress March 2011

Industrial Unionism *"Collective power to meet bread and butter needs and ensure fairness from management"*	Professional Unionism *"Control of the profession to ensure quality"*	Social Justice Unionism *"Equity for our students through active engagement in the community"*
ORIENTATION ▪Emphasizes separation of management and union roles in defining teacher work. "Boards make policy, administrators lead, teachers teach." ▪The role of the union is to limit what teachers can be asked to do and to increase the pay they get for doing it.	**ORIENTATION** ▪Emphasizes building professional learning communities and building the craft and the profession of teaching. ▪Union promotes and protects high quality teaching as a craft, resists threats to teacher professionalism and asserts teacher leadership. Conflicts between teachers and administrators can become de-emphasized.	**ORIENTATION** ▪Emphasizes alliances with parents and the community to organize for social justice to help all children succeed – schools and the conditions around schools must both change to improve educational outcomes. ▪Race and class challenges and socio-economic segregation must be addressed if achievement gaps are to be narrowed.
VIEW OF MANAGEMENT ▪Assumes labor-management relations are hostile and adversarial. Defends teacher rights & responds to grievances. ▪Fights for teacher priorities and standard of living in the budget. Organize teachers as an independent force.	**VIEW OF MANAGEMENT** ▪Values labor-management collaboration and partnership to improve and preserve public education and the profession. ▪Emphasizes programs and priorities to improve school quality and student achievement in the public interest	**VIEW OF MANAGEMENT** ▪Management and labor are partners in engaging families, community and ethnic groups to build support for public education. ▪Advocate together for levy referenda, grants, foundation support, and to resist inequitable solutions based on race & class.
ROLE OF PARENTS ▪Parent outreach when we're in bargaining crisis or labor/mgmt. conflict. ▪Limit parent intrusions into the classroom to protect teacher autonomy.	**ROLE OF PARENTS** ▪Works with parents to improve individual parent support for their child's learning, but believes professionals have unique expertise.	**ROLE OF PARENTS** ▪Reaches out to community allies in strategic alliances to improve the quality of teaching and teacher cultural competency. ▪Seeks to maximize parent role in improving school effectiveness.
BARGAINING ▪Win/lose bargaining; ▪Limit scope of bargaining to bread and butter issues of salary, hours, and "working conditions." ▪Views the teacher contract as way to institutionalize all changes.	**BARGAINING** ▪Broad scope and interest-based bargaining are a way to address teaching quality and support issues. ▪Agreements outside contract. ▪Contracts are a way to codify change once the bugs have been worked out.	**BARGAINING** ▪Infuse bargaining with concerns that address race, class, democracy, empowerment and equity issues. ▪Change can only be institutionalized and sustained by organizing rank-and-file members and the community.
DECISION MAKING Management prerogatives respected on a school and district level. Teachers grieve management decisions through their union.	**DECISION MAKING** Expands teacher decision-making and instructional leadership at school and district level. Joint decision making expands teacher and union ownership.	**DECISION MAKING** Democratic input by all stakeholders creates processes for institutionalized teacher, parent, and student empowerment.

The "Three Frames" document was developed by the Mooney Institute for Teacher and Union Leadership July, 2005, for use in leadership training. A teaching tool and a work-in-progress, it may be used freely with attribution. Questions: Phone 240-603-6450.

Graphic Organizer Page 2:

Industrial Unionism	Professional Unionism	Social Justice Unionism
TEACHING AND THE ACHIEVEMENT GAP •Teachers have limited ability to control conditions that cause the gap. If students come to school unable or unwilling to learn, or if school conditions aren't adequate, teachers must not be blamed. •Efforts to close the achievement gap must not be based on unreasonable expectations and the union's role is to ensure that training and accountability measures don't contribute to an un-sustainable working and learning environment.	**TEACHING AND THE ACHIEVEMENT GAP** •Quality teaching is critical to closing the achievement gap. It is possible to define and measure quality teaching. The union's role is to make sure good methods are used, and that tools like "value-added-modeling" are used judiciously and carefully. •Union takes a leadership role in improving the quality of teaching/learning and professional development.	**TEACHING AND THE ACHIEVEMENT GAP** •Belief in "effort-based intelligence"--all students can learn if adequate resources are equitably distributed and available. •Cultural competency/proficiency for teachers to reach all students. •School district funding, equitable distribution of accomplished teachers and school resources are priorities.
TEACHING WORKING CONDITONS •The union works to improve conditions of teaching (Class size, adequate text books and supplies, hours, etc.) •Union emphasizes protection of teachers' rights – files grievances to resolve conflicts. •Seniority provisions are the best protection against employer favoritism.	**TEACHING WORKING CONDITONS** •The union is willing to take control of the improvement of teaching, support for teacher effectiveness, and quality control in the profession. •Alternatives to seniority-based transfer, assignment and layoff procedures are developed by the union to balance needs of younger and older teachers and the program needs of the educational enterprise.	**TEACHING WORKING CONDITONS** •Assignment of teachers to schools ensures high-quality, experienced teachers in hard-to-staff schools. •The union supports preferential teaching and learning conditions (e.g. lower class sizes) for high poverty schools. •Seniority-based reductions in force will be modified by the union so as not to disproportionately impact high-poverty, high-turnover schools.
CURRICULUM, INSTRUCTION AND ASSESSMENT OF STUDENT LEARNING •Primary role of union is to improve wages, benefits, retirement, and equal treatment for all members. •Curriculum, professional development, assessment and grading policy are the responsibility of the district management. •Teachers are responsible for teaching and students are responsible for learning. •Teachers must not be evaluated primarily based on student test scores because that unfairly and inaccurately credits teachers for low performance that has other causes.	**CURRICULUM, INSTRUCTION AND ASSESSMENT OF STUDENT LEARNING** •Union promotes additional responsibility and pay for teacher instructional leaders. •Union brings the teachers' voice to the design, implementation and evaluation of curriculum, assessment and instruction. •The role of student test scores and other factors in teacher evaluation is negotiated and monitored by the union. •Union accepts necessary role of student achievement/learning in teacher and school accountability, because that is how public schools are judged.	**CURRICULUM, INSTRUCTION AND ASSESSMENT OF STUDENT LEARNING** • Union safeguards teachers' role in promoting critical thinking, critical pedagogy, and a broad curriculum, not aimed primarily at standardized tests. •Teachers encouraged to make curriculum relevant to students' lives and to incorporate student's lives into learning – cultural competence. •Union advocates for a "Broader Bolder Approach" to building a movement to improve the social context for schooling – health care, jobs, housing, etc.

The "Three Frames" document was developed by the Mooney Institute for Teacher and Union Leadership July, 2005, for use in leadership training. A teaching tool and a work-in-progress, it may be used freely with attribution. Questions: Phone 240-603-6450.

Appendix B: Survey Instrument

For images of the electronic survey administered in this study, see attached survey pages 1-10 below:

Begin electronic survey page 1:

Union Membership and Engagement Survey

Thank you for taking the time to complete this survey. It was created to gather opinions from teachers on membership and engagement in teacher unions, as well information about teachers' attitudes and beliefs surrounding the unions' work, benefits, and services. This research project seeks to gather responses from individuals representing a wide range of opinions and beliefs. The data from this survey is part of a Masters Capstone Thesis being completed through Hamline University. Any individual survey information gathered, including district and building information, will remain anonymous. It is estimated that this survey will take approximately 15-20 minutes to complete. Your participation in this project is greatly appreciated!

* Required

(...electronic survey page 1 continued)

Letter of Informed Consent

Saturday, September 22, 2018

Dear Osseo Area Schools teacher,

I am a graduate student working on an advanced degree in Education at Hamline University in St. Paul, MN. As part of my graduate work, I plan to conduct research with licensed teachers in our district from October-April, 2018-19. The purpose of this letter is to request your participation in the first phase of this work.

The topic of my Master's Capstone (thesis) is "How do teachers make decisions around union membership and engagement in my middle school setting?" This survey is meant to explore educators' choices about union membership and engagement and union attitudes and beliefs. The survey includes 10 sections and is estimated to take roughly 15-20 minutes to complete. After completing my research, I will summarize the findings in a report to be distributed to participants, school and district administrators, and Education MN-Osseo leaders.

There is little to no risk if you choose to participate in the survey. Any individual survey information gathered, including district and building information, will remain anonymous. Pseudonyms for the district, school, and participants will be used in the capstone analysis as well as in any presentation of the study's findings..

Participation in the survey is voluntary, and, at any time, you may decline to participate. Your participation in this project will not affect staff employment or evaluation in any way. You may also choose to have your survey content deleted from the capstone at any time without negative consequences.

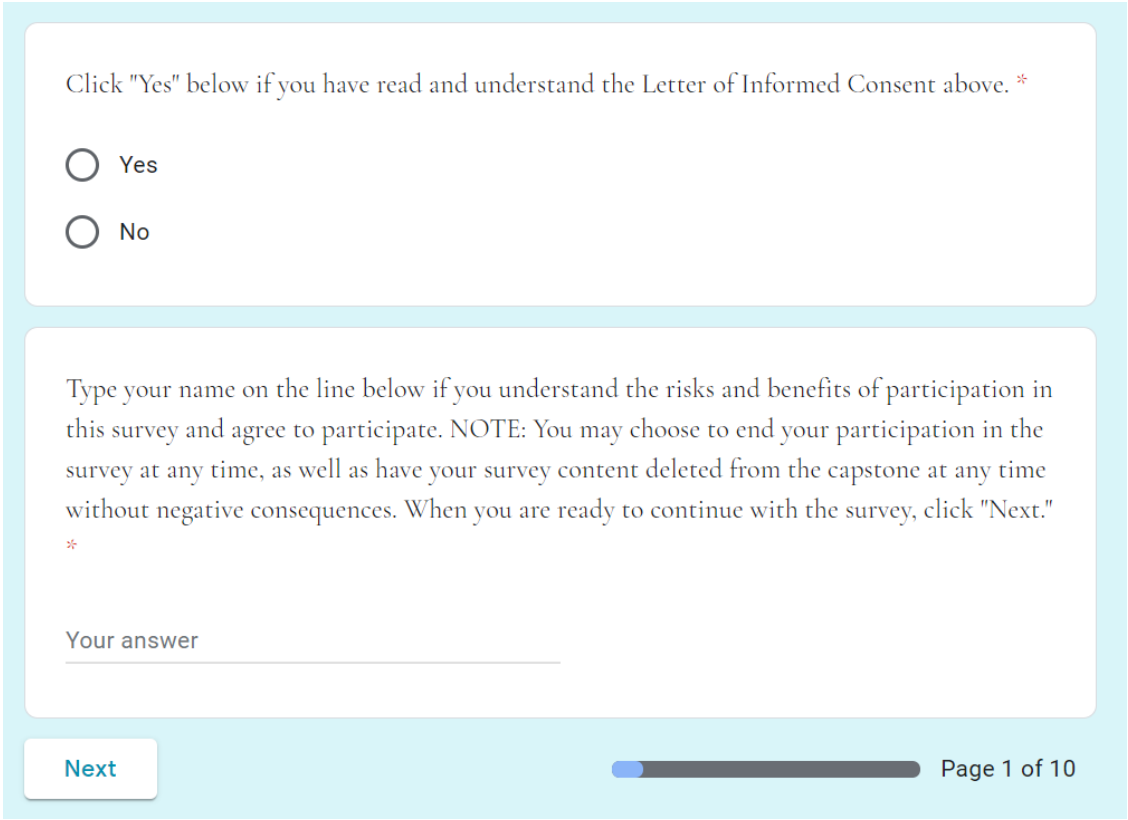
I have received approval from the Hamline University IRB and from our district's Research, Assessment, and Accountability Office to conduct this study. The capstone will be cataloged in Hamline University's Bush Library Digital Commons, a searchable electronic repository. My results might be included in an article in a professional journal or a session at a professional conference. In all cases, your identity and participation in this study will be confidential.

If you have read and understand the terms of participation in this survey, select "Yes" below. Then type your name on the line to give your informed consent to participate. When you are ready to begin the survey, click "Next." If you have any questions, please contact me.

Natalie Sasseville-Praska
EL Teacher at North View Middle School
5869 69th Ave N, Brooklyn Park, MN 55429
952-334-9159
Sasseville-praskaN@district279.org

If you have questions regarding the integrity of this project, please contact the Hamline IRB chair, Lisa Stegall, at IRB@hamline.edu.

(...electronic survey page 1 continued)



End electronic survey page 1

Begin electronic survey page 2:

Demographics

How many years have you been working as a licensed k-12 educator? *

- 0-5
- 6-10
- 11-15
- 16-20
- 21-25
- 26-30
- 30+

What is your current level of education? *

- Currently working towards a bachelor's degree
- Bachelor's degree
- Bachelor's degree plus additional coursework
- Masters degree
- Masters degree plus additional coursework
- Ph.D., Ed.D., or another type of doctorate
- Doctorate plus additional coursework

(...electronic survey page 2 continued)

What content area are you licensed in? (Please check all that apply) *

- [ ] English Language Arts
- [ ] Math
- [ ] Science
- [ ] Social Studies
- [ ] Music
- [ ] Art
- [ ] Family and Consumer Sciences (FACS)
- [ ] Physical Education/Health
- [ ] Technology Education
- [ ] Special Education
- [ ] World Language
- [ ] English Language Learners
- [ ] Media Arts
- [ ] Speech Language Pathology
- [ ] School Psychology
- [ ] School Counselor
- [ ] Other: _____

(...electronic survey page 2 continued)

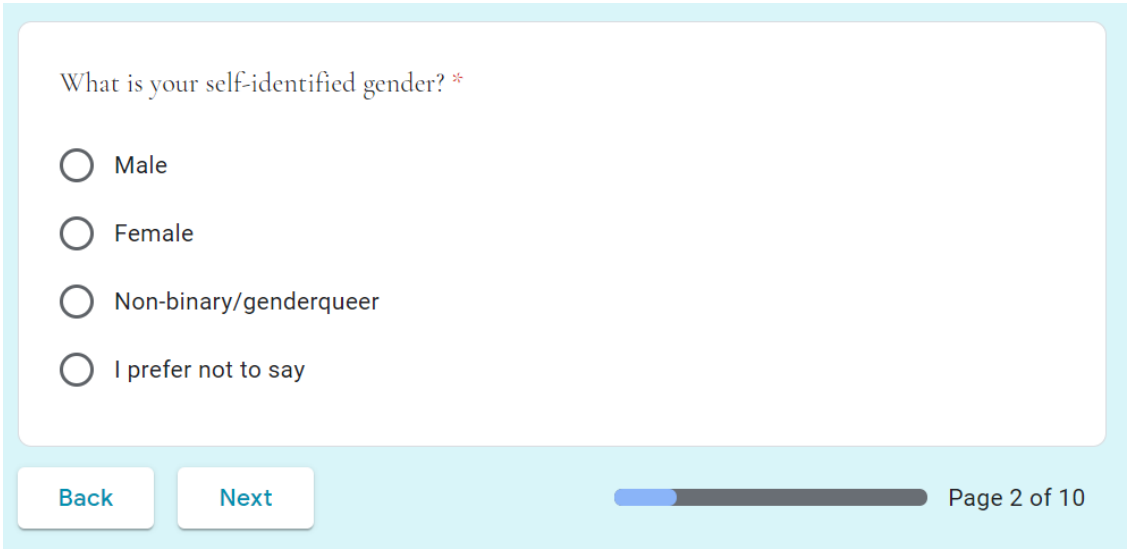
What is your age? *

- ○ 21-30 years old
- ○ 31-40 years old
- ○ 41-50 years old
- ○ 51-60 years old
- ○ 61 years old +

What is your race? *

- ○ Black/of African descent
- ○ Asian or Pacific Islander
- ○ Hispanic/LatinX
- ○ American Indian or Alaska Native
- ○ White/caucasian
- ○ Two or more races
- ○ I prefer not to say

(...electronic survey page 2 continued)



End electronic survey page 2

Begin electronic survey page 3:

Knowledge of Union Services/Benefits

On a scale of 1 to 5, how knowledgeable are you about the work of teacher unions in public education? *

	1	2	3	4	5	
I know nothing about this subject	○	○	○	○	○	I know everything about this subject

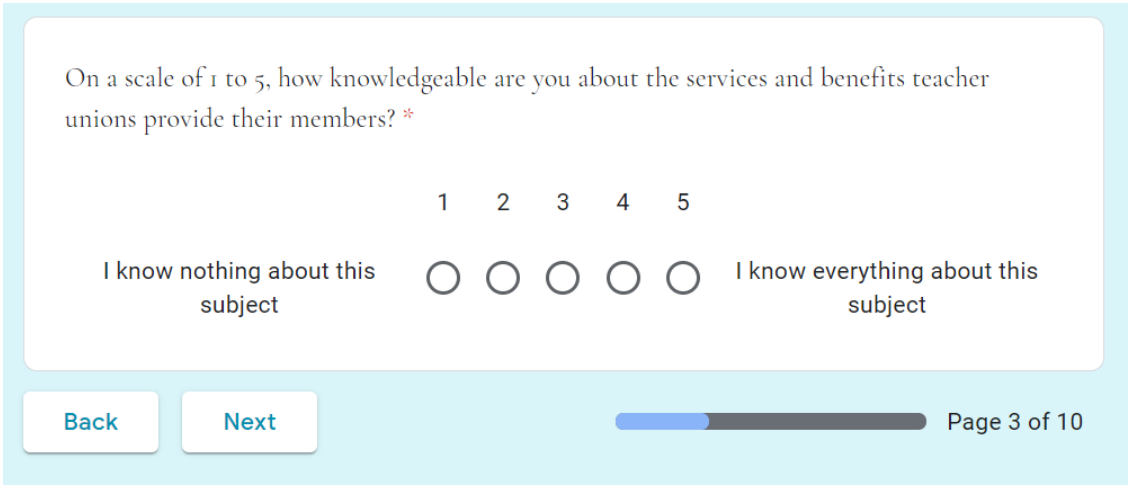
On a scale of 1 to 5, how knowledgeable are you about the work of your local teacher union? *

	1	2	3	4	5	
I know nothing about this subject	○	○	○	○	○	I know everything about this subject

On a scale of 1 to 5, how knowledgeable are you about the work of your state teacher union? *

	1	2	3	4	5	
I know nothing about this subject	○	○	○	○	○	I know everything about this subject

(...electronic survey page 3 continued)



End electronic survey page 3

Begin electronic survey page 4:

Membership Choice

What level of union membership did you select in past years? *

- Fair share fee-payer only
- Full dues-paying member
- Full dues minus cost of fees associated with Political Action Committee and/or Education MN Foundation
- Unsure
- Not applicable because I was not teaching OR I was teaching in a district without a union

What level of union membership will you select in future years? (NOTE: These options reflect the new Education MN membership choices as of June 2018. Fair Share fee payers are now considered non-union members unless they voluntarily register as a new member of Education MN) *

- Full dues-paying member
- Full dues minus cost of fees associated with Political Action Committee and/or Education MN Foundation
- No membership
- Not applicable because I will not be teaching OR I will be teaching in a district without a union

Back Next Page 4 of 10

End electronic survey page 4

Begin electronic survey page 5:

Past Union Engagement

*NOTE: Please choose "Not Applicable" for all questions in this section If you have NOT been working as a licensed educational professional in a k-12 setting for 1 or more years.

How would you describe your level of attendance at union social events (e.g. Whirly Ball, Contract Settlement party, Saints game, etc.)? *

- ◯ I have attended zero union social events
- ◯ I have attended some union social events
- ◯ I have attended many union social events
- ◯ Not applicable because I was not teaching OR I was teaching in a district without a union

How would you describe your level of attendance at building union meetings in the past? *

- ◯ I have attended zero building union meetings
- ◯ I have attended some building union meetings
- ◯ I have attended many building union meetings
- ◯ Not applicable because I was not teaching OR I was teaching in a district without a union

(...electronic survey page 5 continued)

How would you describe your level of attendance at local union general membership meetings in the past? *

- ○ I have attended zero union general membership meetings
- ○ I have attended some union general membership meetings
- ○ I have attended many union general membership meetings
- ○ Not applicable because I was not teaching OR I was teaching in a district without a union

How would you describe your level of attendance at Education Minnesota sponsored professional development opportunities (e.g. MEA Conference, EdMN Summer Seminar, etc.) in the past? *

- ○ I have attended zero Education Minnesota sponsored professional development opportunities
- ○ I have attended some Education Minnesota sponsored professional development opportunities
- ○ I have attended many Education Minnesota sponsored professional development opportunities
- ○ Not applicable because I was not teaching OR I was teaching in a district without a union

(...electronic survey page 5 continued)

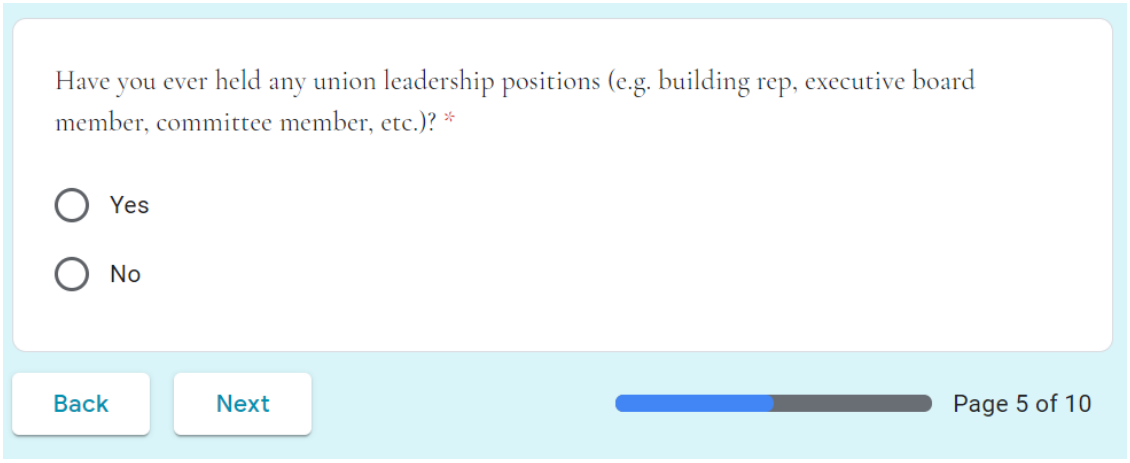
How would you describe your level of attendance at union-related political activities (e.g. Fall political conference, PAC meetings, Lobby days, etc.) in the past? *

- ○ I have attended zero union-related political activities
- ○ I have attended some union-related political activities
- ○ I have attended many union-related political activities
- ○ Not applicable because I was not teaching OR I was teaching in a district without a union

How would you describe your level of attendance at union leadership and governing events (e.g. The Education MN Representative Convention, standing committee meetings, Early Career Leadership Fellows program, etc.) in the past? *

- ○ I have attended zero union leadership/governing events
- ○ I have attended some union leadership/governing events
- ○ I have attended many union leadership/governing events
- ○ Not applicable because I was not teaching OR I was teaching in a district without a union

(...electronic survey page 5 continued)



End electronic survey page 5

Begin electronic survey page 6:

Future Union Engagement

*NOTE: Please choose "Not applicable" for all questions in this section if you are NOT planning to continue working as a licensed k-12 educator beyond this current academic year.

How often do you plan to attend union social events (e.g. Whirly Ball, Contract Settlement party, Saints game, etc.) in the future? *

- ◯ I plan to attend zero union social events
- ◯ I plan to attend some union social events
- ◯ I plan to attend many union social events
- ◯ I am not sure
- ◯ Not applicable because I will not be teaching OR I will be teaching in a district without a union

How often do you plan to attend building union meetings in the future? *

- ◯ I plan to attend zero building union meetings
- ◯ I plan to attend some building union meetings
- ◯ I plan to attend many building union meetings
- ◯ I am not sure
- ◯ Not applicable because I will not be teaching OR I will be teaching in a district without a union

(...electronic survey page 6 continued)

How often do you plan to attend local union general membership meetings in the future? *

- ○ I plan to attend zero union general membership meetings
- ○ I plan to attend some union general membership meetings
- ○ I plan to attend many union general membership meetings
- ○ I am not sure
- ○ Not applicable because I will not be teaching OR I will be teaching in a district without a union

How often do you plan to attend Education Minnesota sponsored professional development opportunities (e.g. MEA Conference, EdMN Summer Seminar, etc.) in the future? *

- ○ I plan to attend zero Education Minnesota sponsored professional development opportunities
- ○ I plan to attend some Education Minnesota sponsored professional development opportunities
- ○ I plan to attend many Education Minnesota sponsored professional development opportunities
- ○ I am not sure
- ○ Not applicable because I will not be teaching OR I will be teaching in a district without a union

(...electronic survey page 6 continued)

How often do you plan to attend union-related political activities (e.g. Fall political conference, PAC meetings, Lobby days, etc.) in the future? *

- I plan to attend zero union-related political activities
- I plan to attend some union-related political activities
- I plan to attend many union-related political activities
- I am not sure
- Not applicable because I will not be teaching OR I will be teaching in a district without a union

How often do you plan to attend union leadership/governing events (e.g. The Education MN Representative Convention, standing committee meetings, Early Career Leadership Fellows program, etc.) in the future? *

- I plan to attend zero union union leadership/governing events
- I plan to attend some union union leadership/governing events
- I plan to attend many union union leadership/governing events
- I am not sure
- Not applicable because I will not be teaching OR I will be teaching in a district without a union

Back Next Page 6 of 10

End electronic survey page 6

Begin electronic survey page 7:

Barriers to Membership and Engagement

NOTE: In this section, only respond to the questions that apply to you. Please SKIP the questions that DO NOT apply to you. Remember: past Fair Share fee payers are no longer considered union members as of June 2018.

Current union members only: Will you renew your membership with Education MN this year?

- ○ Yes
- ○ No
- ○ Still undecided

Current union members only: What barriers get in the way of attending union-related events? (check all that apply):

- ☐ I have too many family or personal commitments
- ☐ I have too heavy a workload
- ☐ I do not want to spend more of my time thinking about school
- ☐ I do not think union engagement is worth my time
- ☐ Other: _____

(...electronic survey page 7 continued)

New teachers OR teachers who previously taught in a district without a union: On a scale of 1 to 5, what is the likelihood that you will become a full dues-paying member of Education MN this school year?

	1	2	3	4	5	
Very unlikely	○	○	○	○	○	Very likely

New teachers OR teachers who previously taught in a district without a union: What barriers may get in the way of attending union-related events? (check all that apply):

- ○ I have too many family or personal commitments
- ○ I have too heavy a workload
- ○ I do not want to spend more of my time thinking about school
- ○ I do not think union activity is worth my time
- ○ Other: _____

(...electronic survey page 7 continued)

Former Fair Share fee payers/Current Non-members: On a scale of 1 to 5, what is the likelihood that you will become a full dues-paying member of Education MN this school year?

	1	2	3	4	5	
Very unlikely	○	○	○	○	○	Very likely

Former Fair Share fee payers/Current Non-members: What are your reasons for not joining the union? (check all that apply)

- [ ] I cannot economically afford union dues
- [ ] I believe teacher unions are ineffective
- [ ] I believe the benefits of the union are not worth the costs
- [ ] I disagree with union political activities
- [ ] I believe teacher unions value members over students
- [ ] Other: _____

Back Next Page 7 of 10

End electronic survey page 7

Begin electronic survey page 8:

Union Attitudes and Beliefs

For questions 1-4, please share your level of agreement with the following statements:

Teacher unions do important work. *

	1	2	3	4	5	
Strongly disagree	○	○	○	○	○	Strongly agree

The benefits teacher unions provide their members are worth the cost. *

	1	2	3	4	5	
Strongly disagree	○	○	○	○	○	Strongly agree

Teacher unions work for the best interest of students. *

	1	2	3	4	5	
Strongly disagree	○	○	○	○	○	Strongly agree

(...electronic survey page 8 continued)

Teacher unions are successfully evolving to meet the needs of a changing world. *

	1	2	3	4	5	
Strongly disagree	○	○	○	○	○	Strongly agree

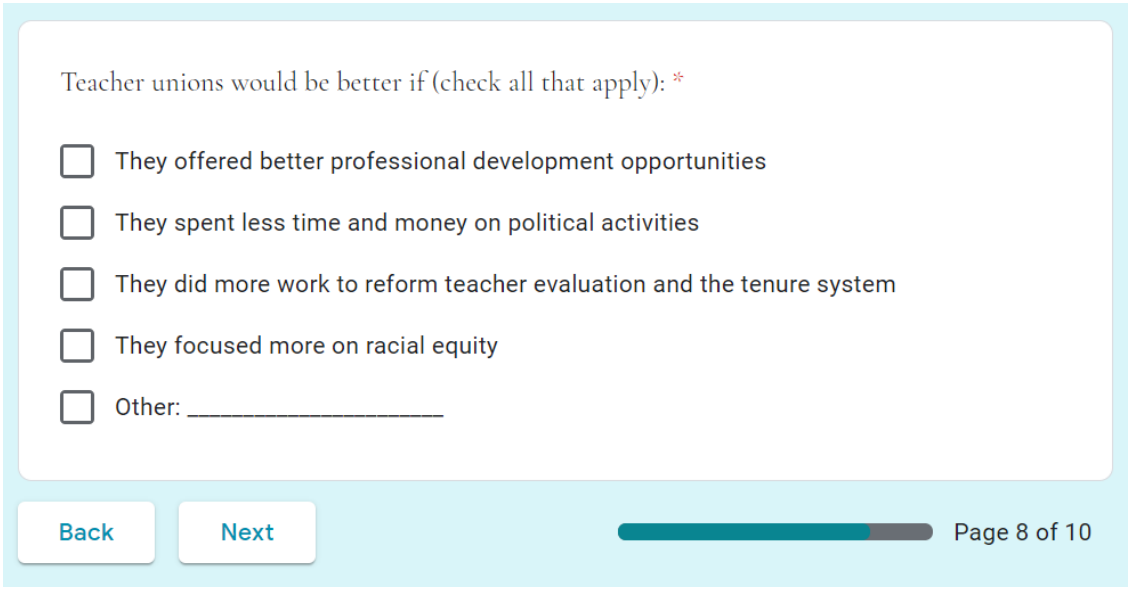
Questions 5 & 6

For questions 5-6, choose the answer that best reflects your personal opinion:

Under what climate conditions do school districts and unions work together most productively? *

- ○ In a collaborative labor management environment
- ○ In a competitive business environment
- ○ Other
- ○ Unsure

(...electronic survey page 8 continued)



End electronic survey page 8

Begin electronic survey page 9:

Interview Opt-in

In the next stage of this capstone research project, I will be conducting semi-structured, one-on-one interviews with licensed teaching staff. Interviews will focus on educators' union membership and engagement as well as their attitudes and beliefs regarding teacher unions. I will conduct these one-on-one interviews with a small sample of educators chosen from the larger pool of survey respondents. I am very interested in hearing from individuals with a wide range of union engagement levels and attitudes and beliefs regarding teacher unions. Participation in the interview is voluntary, and, at any time, you may decline to participate in the interview. You may also choose to have your interview content deleted from the capstone at any time without negative consequences. If you indicate below that you are willing to participate in an interview, I will use the contact information you provide to arrange an interview at a time and location convenient to you. Your contact information will not be associated with your previous responses, so your survey answers will remain anonymous.

Do you agree to participate in a semi-structured, one-on-one interview with the researcher? *

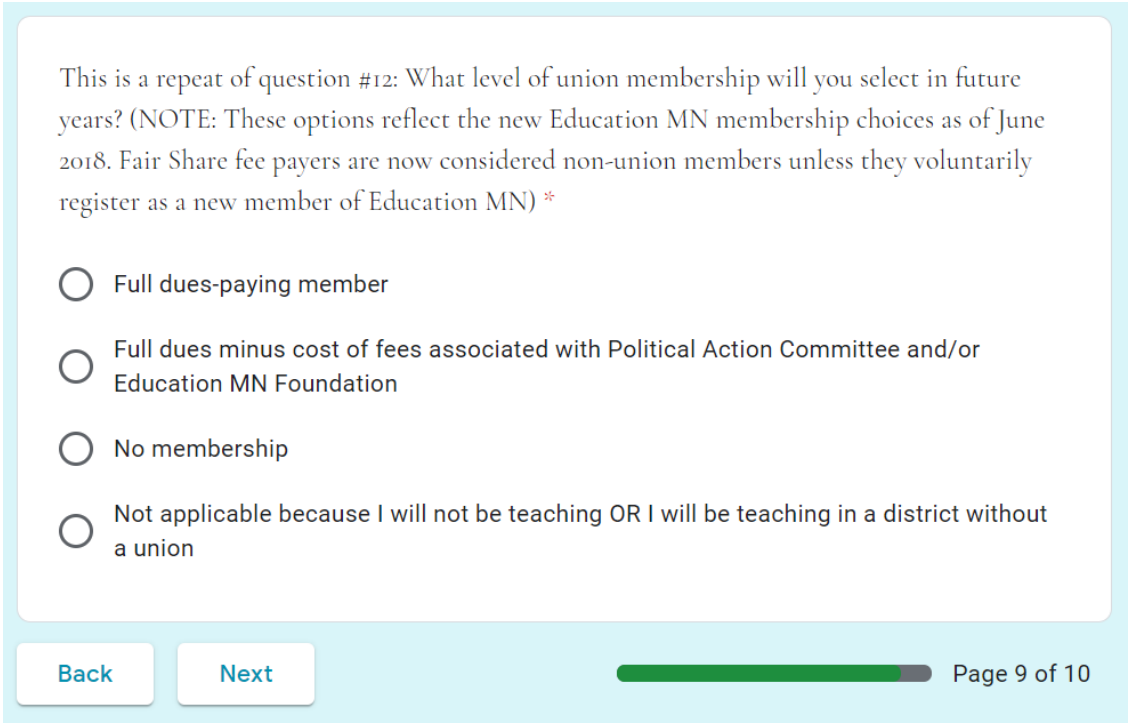
- ○ Yes
- ○ No

If you answered yes...

Please type your first and last name and personal email address below. OPTIONAL: Add phone number for easier communication.

Your answer

(...electronic survey page 9 continued)



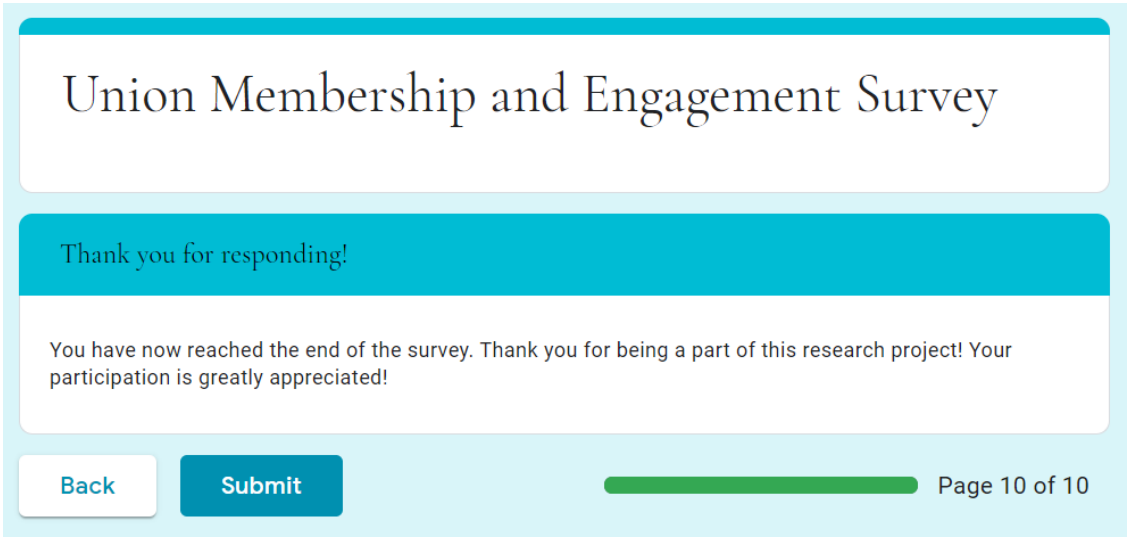
This is a repeat of question #12: What level of union membership will you select in future years? (NOTE: These options reflect the new Education MN membership choices as of June 2018. Fair Share fee payers are now considered non-union members unless they voluntarily register as a new member of Education MN) *

- ○ Full dues-paying member
- ○ Full dues minus cost of fees associated with Political Action Committee and/or Education MN Foundation
- ○ No membership
- ○ Not applicable because I will not be teaching OR I will be teaching in a district without a union

Back Next Page 9 of 10

End electronic survey page 9

Begin electronic survey page 10:



End electronic survey page 10

Appendix C: Semi-Structured Interview Consent Form

Letter of Informed Consent: Semi-Structured Interview

Tuesday, July 7, 2020

Dear Osseo Area Schools teacher,

I am a graduate student working on an advanced degree in Education at Hamline University in St. Paul, MN. As part of my graduate work, I plan to conduct research with licensed teachers in our district from July-September, 2020. The purpose of this letter is to request your participation in the second phase of this work.

The topic of my Master's Capstone (thesis) is "How do teachers make decisions around union membership and engagement in my middle school setting?" This set of interviews is meant to more deeply explore educators' choices about union membership and engagement and union attitudes and beliefs. These interviews will last for about 30 minutes and will be recorded. After completing the interviews, I will summarize the findings in a report to be distributed to interview participants, school and district administrators, and Education MN-Osseo leaders.

There is little to no risk if you choose to participate in the interview. All results will be confidential and anonymous. Pseudonyms for the district, school, and participants will be used. The interviews will be conducted at a place and time convenient to you, and the recordings of the interviews will be destroyed following completion of the study.

Participation in the interview is voluntary, and, at any time, you may decline to participate in the interview. Your participation in this project will not affect staff employment or evaluation in any way. You may also choose to have your interview content deleted from the capstone at any time without negative consequences.

I have received approval from the Hamline University IRB and from our district's Research, Assessment, and Accountability Office to conduct this study. The capstone will be catalogued in Hamline's Bush Library Digital Commons, a searchable electronic repository. My results might be included in an article in a professional journal or a

session at a professional conference. In all cases, your identity and participation in this study will be confidential.

If you agree to participate, please sign and date the agreement to participate on page two. If you have any questions, please contact me.

Natalie Sasseville-Praska
EL Teacher at North View Middle School
5869 69th Ave N, Brooklyn Park, MN 55429
952-334-9159
Sasseville-praskaN@district279.org

If you have questions regarding the integrity of this project, please contact the Hamline IRB chair, Lisa Stegall, at IRB@hamline.edu.

Agreement to Participate: Semi-Structured Interview

Directions: Please read and sign below if you agree.

I have read the Letter of Informed Consent attached to this form and understand the risks and requirements of participation in this study. I agree to participate in the study as an interviewee, and understand that I may decline to participate in the interview at any time, as well as have my interview content deleted from the capstone at any time without negative consequences.

Signed,

Name: _____

Date: _____

Appendix D: Semi-Structured Interview Protocols

Friday, July 10, 2020

"How do teachers make decisions around union membership and engagement in my middle school setting?"

Semi-Structured Interview Protocols

From the pool of survey respondents who participated in phase 1 of my research, I will select a small sample (5-10 individuals) of educators who appear representative of the original pool in terms of union membership to participate in semi-structured interviews. The interviews will last approximately 30-40 minutes and will be recorded. I will ask each participant the questions in **bold** as they apply (some questions apply only to certain participants), and may follow up with other questions below the one in bold. I may ask some un-written questions that do not appear on the list below if they become relevant to the conversation. The goal of the semi-structured interview is to gain as much information as possible about educators' choices surrounding union membership and engagement and union attitudes and beliefs.

Questions (and potential follow-up questions)	Notes
1. **Can you please tell me a little bit about your background in education?** a. Where and when did you get your teacher education? b. What content area(s) do you teach?	

c. How many years have you been a licensed teacher? d. What are the general commitments on your time outside of the school day?	
2. At this point in your teaching career, how knowledgeable are you about the work of teachers' unions? a. What do you know about the unions we as Osseo teachers can join? b. What do you know about the services/benefits unions provide to their members? c. What do you know about the work our unions are currently focused on?	
3. Teachers who have been teaching 1 or more years: What level of union membership did you choose to select in past years? a. If confused, explain that the options were full dues-paying member, full dues minus cost of PAC and/or foundation costs, fair share fee payer (explain), or non-member (only in right-to-work states or districts without unions). b. What are your reasons for selecting this level of membership?	
4. In the past, teachers who chose not to become full dues-paying union members still had to pay what's called a fair share fee for the cost of union representation during contract negotiations. As	

of this summer, due to a recent Supreme Court decision, the union membership options have changed. Teachers no longer have to pay a fair share fee if they do not want to become union members. Given these changes, what level of union membership will you choose to select? a. What are your reasons for selecting this level of membership? b. Union members receive various benefits including but not limited to Professional Development opportunities, legal representation, discounted insurance, and other financial incentives. How important to you are these benefits? Why?	
5. Teachers who have been teaching 1 or more years: If you were a union member in the past, how would you describe your level of engagement at union events? a. Ask specifically about attendance at union social events, building union meetings, local union general membership meetings, Education MN sponsored professional development opportunities, union-related political activities, and union leadership/governing events. b. What are your reasons for	

engaging in union events at this level? c. What barriers get in the way of attending union events?	
6. All teachers: How engaged do you plan to be in union events in the future? a. Ask specifically about attendance at union social events, building union meetings, local union general membership meetings, Education MN sponsored professional development opportunities, union-related political activities, and union leadership/governing events. b. What are your reasons for wanting to engage in union events at this level? c. What barriers may get in the way of attending union events?	
7. What are some of your personal beliefs about teacher unions? a. Do you believe unions do important work? b. Do you believe the benefits teachers' unions provide are worth the costs? c. Do you believe teachers' unions work for the best interests of students? d. Do you believe teachers' unions are successfully evolving to meet the needs of a changing world?	
8. Some districts have contentious relationships with their teachers'	

unions and other districts have more collaborative relationships with their teachers' unions. What kind of relationship between district and teachers' union do you think provides the best working environment for students? Why? a. How have you seen evidence of this in schools?	
9. What changes do you think would make your local teachers' union better? Why? a. What factors are problematic? b. How can they be improved?	
10. What changes do you think would make your state and/or national teachers' unions better? Why? a. What factors are problematic? b. How can they be improved?	