AN ABSTRACT OF THE DISSERTATION OF

Gregory Paul Sampson-Gruener for the degree of Doctor of Philosophy in Education

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Title: An Empirical Analysis of Educator Beliefs Related to Post-Industrial Labor

Reforms in the State of Oregon.

Abstract Approved:

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Darlene Russ-Eft

        This study examines educator perceptions related to what has been termed

New-Union labor reforms. The study provides a review of literature related to teacher

Unionization and details a mixed methods analysis of educator beliefs related to three

specific labor reforms: (a) alternative salary structures, (b) collaborative, or interest

based bargaining processes and, (c) peer review programs related to contract renewal

for classroom educators. The study utilized extensive statistical methods to analyze

the results of a 36 item survey. Nearly 800 educators across the State of Oregon

completed the survey instrument during spring of 2008. Controls for demographics

were also employed to better understand sub-group differences and account for

variability in response patterns. Additionally, four interviews were conducted with

practicing classroom educators to obtain individual perspectives on the labor reforms

and to better understand the results of the quantitative analysis. Results revealed that respondents affirmed some components of labor reform, rejected other components of labor reform, and were split on certain features of labor reform. The most reliable finding from the study related to the outcome that educators view standardized achievement tests as subjective. As a result teachers rejected the idea of being paid for student performance. At the same time teachers were open to the possibility of raising wages through other venues of compensation. Additionally, educators endorsed the ideals of collaborative bargaining processes as opposed to industrial or traditional bargaining processes. Finally, Oregon educators did not endorse peer review for contract renewal. Rather, peer review was endorsed for professional development purposes only. Themes of local control were also evident in the response data. A discussion of the quantitative and qualitative results follows the analysis.

An Empirical Analysis of Educator Beliefs Related to Post-Industrial Labor Reforms
in the State of Oregon

by

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Dean of the Graduate School

I understand that my dissertation will become part of the permanent collection of Oregon State University libraries. My signature below authorizes release of my dissertation to any reader upon request.

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Gregory Paul Sampson-Gruener, Author

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CHAPTER ONE

INTRODUCTION, FOCUS AND, SIGNIFICANCE

Few educational scholars have taken on endeavors to study the teachers' Union. As Hannaway and Rotherham (2006) have pointed out, teacher Unionism is virtually unexplored in educational research literature and has only recently been recognized as a topic that might be important for serious scholarly pursuits. As such, Hess and West (2007) have recently made a call for Union reforms, based on empirical evidence, for a variety of factors: (a) the Union is an incredibly powerful agency in 21st century public education; (b) the Union extensively drives educational process; and (c) the Union is theorized to have a vast potential to contribute towards positive educational outcomes in the United States by advocating for the needs of teachers and students simultaneously.

This makes the study of teacher Unionism wide open to scholarly inquiries on multiple levels and leaves researchers hoping to study the Union with many unanswered questions. The overall purpose of this study is to understand whether Oregon educators are amiable towards particular Union-based labor reforms across the State of Oregon.

Focus and Significance

The focus of this dissertation is related to emerging practices of teacher Unionism based on post-industrial labor models in school systems, particularly within the state of Oregon. These emerging practices are often referred to as *New Unionism* and encompass three interesting areas of school based labor reforms: (a) peer review programs in K-12 systems; (b) performance pay plans that do not follow industrial wage models; and (c) alternative forms of bargaining that are considered post-industrial (Goldstein & Noguera, 2006; Koppich, 2005; Lieberman, 1998; Urbanski & Erskine, 2000; Wagner, 1991).

Teacher Unions have utilized strictly industrial labor models (Wagner, 1991). Recently, however, there has been considerable attention towards New Union practices that rely on post-industrial labor models. Given this, multiple questions have arisen as to whether or not public schools are an appropriate place for industrial labor relations between management and employees (Kerchner, Koppich, & Werres, 1997). This study seeks to understand the extent to which Oregon educators find merit with post-industrial labor models by analyzing teacher perceptions of these New Union practices.

The significance of studying educator perceptions of these New Union practices, or post-industrial labor models, is important for three reasons. First, as mentioned above, the teachers' Union wields extensive institutionalized power in the educational system. As Kalhenberg (2006) has pointed out, the teachers' Union is one of the most influential political forces in the contemporary American educational

system. These findings coincided with earlier research related to the institutionalized power that the teachers' Union holds (Kerr-Jessup, 1985). Put in overly simple terms, the teachers' Union drives many practices in education, ranging from minor issues of extra duty obligations (recess duty, hall monitoring, etc.) to important issues in curriculum, instruction, and educational policy through political power and advocacy (Streshly & DeMitchell, 1994). Due to the fact that teachers direct the power of the Union, understanding educator perceptions of reform initiatives is highly important. If education professionals reject certain labor reforms through the institutionalized power of the Union, those labor reforms become futile despite possible advantages of labor reforms.

Second, the Union has moved forward with some highly controversial practices (Hess & West, 2007). There are few studies that explore constituent perspectives of these controversial practices and labor changes. As Hess and West have demonstrated, teachers voice their opinion related to labor changes in the election process of the Union leaders. Further, the scholarly paradigms related to teacher Unionism generally involve policy analysis, institutional reform, and economic literature. Which do not take into account educator perceptions or opinions of the Union (Bascia, 1994). Studying emerging Union practices by analyzing constituent perspectives has merit.

Third, teachers' Unions are not going to become any less influential in the near future, nor will they be giving up their institutionalized power. Teacher Unions continue to be the fastest growing labor organizations, despite an overall trend

pointing towards a decrease in labor Union membership amongst other trades and professions (Farber, 2006).

Currently, the National Education Association (NEA) and the American Federation of Teachers (AFT) boast an approximate membership of over 4.5 million education professionals. Through the process of fee assessment and dues, this leaves the two teachers' Unions with tangible monetary resources to advocate for the ranks of educators across the country. Further, this Unionized employment situation creates a government chartered monopoly on the bargaining and employment process of the educators of the nation, a situation criticized in several policy perspectives (Lieberman, 1998).

Rationale for State Level Study

The significance for this study at the statewide level is evidenced by multiple factors; and a discussion of these factors is warranted to understand why this state-wide study is being proposed. Essentially, this study considers national labor trends and determines the Oregon educator perspective towards those trends.

As most readers will recognize, identifying a population is critical for any research undertaking that seeks to make generalizations. This study is firmly rooted in empirical research methodology. Thus, a population frame that can be easily identified is necessary. The State of Oregon is a recognizable, singular unit of study that creates a self identifying population frame. Generalizations from this population frame may have broader significance for teacher labor organizers across the State of Oregon.

Moreover, public employee Unions organize within a state level organizational scheme. The teachers' Union is no different. Every state has its own unit, structure, and functioning process related to public employment. State governments direct the collective bargaining process and, thus, create a natural unit of study state-by-state. An excellent example of this is to consider the Public Employee Collective Bargaining Act that has been implemented in Oregon (PECBA, 2007).

This statewide scheme controls for variables that may become confounding. If this research study was proposing a multiple state study, there would have to be extensive controls for variations in salary schemes, collective bargaining processes, and tenure and review protocols. These three themes are often very different across states, as evidenced by the Johnson-Moore et al, (2007) study. These variations could influence respondent attitudes towards the constructs being studied. Thus, a state-by-state analysis is an appropriate way to create a unit of study which automatically controls for that potential bias. By limiting the study to a singular level of study (the State of Oregon), there is less bias being introduced into the data obtained from participants.

Purpose of Study & Research Questions with Rationales

As Johnson-Moore et al, (2007) pointed out there is no single unified system to bargain for teachers across the country at the local level. Despite the fact that there are large national Unions that provide technical assistance and advocacy to school employees, the employees of school districts are responsible for creating their own

local bargaining units. Thus every school district conducts its own bargaining with its own associations, despite affiliations with larger labor organizations. This leads to extensive variance in the bargaining and labor practices across individual school districts.

The purpose of this study is to determine whether Oregon educators are amiable towards newly emerging Union practices based on post-industrial labor paradigms. This study seeks to understand what educators believe related to those labor changes.

Few studies exist in the current research literature related to teacher perceptions and perspectives of the teachers' Union. Even fewer studies exist that examine perspectives and perceptions related to New Unionism and the corresponding changes. This study is expected to contribute towards what is known about New Unionism by analyzing constituent perspectives of emerging Union practices and the related changes.

Little research exists to understand what educators actually believe about Unionism in general and the emerging themes of New Unionism in particular (for a complete review of the emerging topics in Unionism, refer to the works of Kerchner, Koppich & Werres, 1997 and Johnson-Moore & Donaldson, 2006). This leads to the central question of this dissertation: To what extent do educators in the state of Oregon find merit with post-industrial relations versus industrial labor relations? Or, to what extent do Oregon educators believe labor changes are warranted or have value? This could be further elaborated on by asking the following three research questions (RQ):

RQ 1. To what extent do educators in Oregon find merit in reform-based, collaborative bargaining?

RQ 2. To what extent do educators in Oregon find merit with alternative pay structures?

RQ 3. To what extent do educators in Oregon find merit with peer assistance and review as a plan for professional growth and employee evaluation?

RQ 1: To What Extent Do Educators in Oregon Find Merit in Reform-based, Collaborative Bargaining?

Reform-based bargaining and collaborative strategies have been employed across the country as an alternative to the pervasive industrialist strategies that are largely discussed by Murphy (1990) and Urban (2000). Yet, there is no empirical evidence that teachers are interested in utilizing reform based bargaining. As Hess and West (2007) pointed out in the recent comprehensive examination of Union practices, teachers who are met with Union based leadership strategies that are counter to organizational norms or goals will often vote to recall Union leaders. As such, clear evidence as to whether or not teachers support this style of bargaining (a major labor change practice) in place of industrial bargaining does not exist in educational literature.

RQ 2: To What Extent Do Educators in Oregon Find Merit With Alternative Pay Structures?

As noted by Johnson-Moore and Donaldson (2006), pay is inherently linked to social status, and teachers often view themselves as underpaid. Common sense would

suggest the opportunity to earn more money for similar work is appealing. Yet,

anecdotal evidence from the Koppich study (2005) suggests that teachers, in some

circumstances, may not want opportunities to earn more money if there is a perceived

threat to existing sources of income. There is no empirical evidence that defines

whether teachers are largely interested in abandoning industrial style pay structures for

more alternative forms of pay-for-performance. Teacher beliefs related to this labor

reform are largely absent from the literature.

RQ 3: To What Extent Do Educators in Oregon Find Merit With Peer Assistance and Review as a Plan for Professional Growth and Employee Evaluation?

Peer assistance and review is becoming popular in certain parts of the country

(Goldstein & Noguera, 2006). Yet, it is still regarded as a trendy practice with no real

meaningful outcomes for public education (Lieberman, 1998). To this extent, teachers

have not necessarily been asked for their systematic opinion on the topic. Empirical

evidence is needed to determine whether educators are interested in abandoning

traditional forms of review for more alternative forms of review that will largely

assure compliance to group and peer expectations. While peer review happens to be

against regulatory statutes that govern employment in many states, there is a pervasive

feeling amongst Unionists that lobbying to change this is appropriate (Koppich, 2005).

Again, empirical evidence of teacher beliefs in this area is largely missing.

Need for This Study

The need for this particular study is framed by five compelling reasons. First, few studies have actually looked at educator perceptions of Unionism. High quality research (Clark, 2000) in this field emerged from Australia and appears to be almost absent in American educational research on the topic of Unionism. While the Australian research focused on administrator perspectives of teacher Unionism, the need was clearly identified to look towards inner perspectives and beliefs related to Unionism.

In the same tradition of the Clark (2000) research, Johnson-Moore, et al, (2007) set out to study beliefs and perspectives of Union leaders across the United States. As a first limitation of this study, it failed to use a representative sample of Unions (the study focused largely on major metropolitan areas), and only those who achieved the position of being a leading labor organizer were included in the study. Thus, the inner-constituent perspective may not have been adequately represented. As a second limitation, the Johnson-Moore study attempted to generate findings across the entire United States. Thus, limited generalizations can be made in combination with the first limitation. There is no guarantee that a Union leader in a large inner-city school district has the capacity to understand the issues facing every educator across the country. Notably, Johnson-Moore et al, describe these limitations openly. The present study controls for those limitations by including a representative sample of educators from a wide variety of school districts across a singular, well defined statewide region.

Second, American scholars could be conducting similar research to better understand how Union activities and practices affect rank and file teachers considering the rapid changes in Unionization in the last 20 years (Urbanski & Erskine, 2000). Given the recent attention on standardized testing, current paradigms in American educational research on Unionism are primarily focusing on how Unionism enhances standardized achievement.

While student achievement is an important topic, looking at inner perspectives of labor reforms also has merit. Considering the fact that there are multiple commonalities between American and Australian schools, U.S. researchers may benefit from adopting similar research pursuits. This study points toward the inner perspectives of the constituents, as has the Australian research and the newly published research of Johnson-Moore et al, (2007).

Thirdly, as mentioned above, many of the published studies in the field of teacher Unionism analyze whether teacher Unionization actually produces higher standardized achievement for students (Eberts & Stone, 1984; Hoxby, 1996; Kurth, 1987; Nelson & Rosen, 1996; Steelman, 2000; Urbanski, 2003). While not a concern for this study, these studies analyzed whether Union teachers are "better" than non-Union teachers in regard to student standardized outcomes, or whether certain kinds of Union teachers are more effective than other kinds of Union teachers. By analyzing achievement data and using that analysis as a basis for labor models, the research ignores teacher perspectives and discounts the agency and expertise that teachers bring to the bargaining table. This current study, rather, looks toward teaching constituents

as experts and discounts the need to analyze only standardized achievement data for purposes of educational policy planning.

Fourth, many of the above cited studies were conducted by economists who may or may not have experience in public education. It is a central perspective of this study that the teachers' Union is an appropriate topic of study for educational researchers within the field of teaching and learning. And, it is not necessarily appropriate to look to economic research models to determine whether teacher Unions and their practices have merit. By looking to economists to determine what teacher Union practices should be adopted, educational researchers and teaching professionals may lose their scholarly voices in the field of teacher Unionization.

Fifth, and finally, the report by Hess and West (2007) has demonstrated that what teachers want in regard to Unionism is not static. Rather, understanding teacher needs and wants in their Union activities is important, because it is complex and dynamic. Some school labor systems may be interested in components of change; others may not be interested in changing at all. If teacher needs and wants are ignored, political casualties in teacher labor organizations are likely to follow on both the local and state level. Thus, having a clear picture of constituent perspectives is warranted. Simply put, teachers are quick to vote out Union leaders who have different opinions than the majority of the teacher labor constituents. This study attempts to clearly identify teacher related to emerging labor organization strategies based on the perspectives of practicing educators. Further, it provides meaningful information to Union leaders, school officials, and policy experts to steer the direction of teacher labor organizations related to post-industrial labor strategies and reforms.

Conclusion

This study was developed largely in response to the report by Hess and West (2007). The present study analyzed statewide data related to teacher perspectives of labor reforms by answering three key questions related to post-industrial labor strategies. Simply put, the entire purpose of the present study was to determine whether Oregon educators find merit with post-industrial labor strategies.

This study was conducted for several reasons and has significance at several levels. First, this study systematically sampled educators related to their opinions and beliefs on the topic of post-industrial labor reforms: (a) peer review programs, (b) alternative salary structures, and (c) collaborative labor practices. Few studies have undertaken this kind of endeavor despite the need for such information.

As far as significance, this study moves the field of research related to Union reforms forward by conducting original research into teacher beliefs related to Union reforms in the same tradition that has been adopted internationally. As noted above, few American scholars have asked what educators believe about the Union in general or reforms in particular. Third, this study changes the conversation of teacher Unionization away from the recent discussions of achievement and Unionization. Or, put in more simple terms, this study removes the "economic lingo" from the academic discussion of teacher Unionization and places the topic of Unionization back into the arena of educationalists and K12 studies.

Additionally, significance is established because little research literature exists in the field of teacher Unionization. We can elaborate by saying this study attempts to contribute toward the small amount of research on teacher Unionization by exploring the inner perspective of teachers related to a specific group of labor reforms. By empirically describing educator beliefs related to specific labor reforms, this study also provides evidence as to whether or not Oregon will move forward with possible labor reforms.

Chapter two describes the literature related to Union practices. It is expected that the reader will be left with a theoretical and practical understanding of the issues related to teacher Unionization and the contextual implications for this study.

CHAPTER TWO

LITERATURE REVIEW

This chapter provides readers with a solid understanding of the key issues related to teacher Unionism. It (a) provides the reader with a historical perspective of the teachers' Union in the U.S., (b) describes the emergence of New Unionism and post-industrial labor reforms related to school systems, (c) describes specific practices related to New Unionism, (d) describes how what is known about teacher Unionism will inform this particular study, and (e) is expected to leave the reader with a clear understanding of the contextual issues for this particular state-level study.

Approach to the Literature

This literature review began with a search through several data bases for articles, studies, and other sources of information related to the teachers' Union. Via EBSCOhost, several related databases were accessed. These databases included: (a) Education Research Complete; (b) Education Resource Information Center; (c) Professional Development Collection; (d) Business Source Premier; and (e) Econ Database. Additionally, Oregon State University catalogs were accessed to search for books and edited volumes related to the topic. The accessed databases included: (a) Oregon State University Library Catalogs to search for on campus holdings; (b) Summit Database to search for texts that may have been held by other statewide

campuses; and (c) OCLC World Catalog to search for texts not available in the state or on campus.

Eleven key searches provided information related to the scholarly topic of Unionism. These searches included key terms for: (a) Teacher Unions, (b) teacher organizations, (c) teacher labor movement, (d) teacher Unions and educational reforms, (e) collective bargaining, (f) Unionism and education, (g) collaborative bargaining, (h) New Unionism, (i) teacher labor organizations, (j) National Education Association, and (k) American Federation of Teachers. (Key authors in the field were also identified in utilizing these search terms.) From this point, a working bibliography was developed and articles were explored for inclusion in this literature review. Generally, articles that were not written for scholarly audiences were not included. Union magazines (also known as trade publications) were also not included.

Historical Perspectives on Teacher Unionism

Key historical studies address the emergence of teacher Unionism. This historical review largely draws from the original and exhaustive works of Murphy (1990) and Urban (2000). Further, this analysis was informed by the works Kalhenberg (2006) who developed a comprehensive study on the history of collective bargaining in school systems.

Readers may become wary of seeing the above mentioned authors cited numerous times in the next section. However, they should rest assured that these authors are the definitive sources on the history of the Union. It should be noted that

other writers have cited these authors numerous times when drawing historical

conclusions around the nature of teacher Unionism (Hoxby, 1996; Kerchner &

Cauffman, 1995).

1850s

The teachers' Union had its formative beginnings in 1857 when over 40

individuals (mainly male, school administrators) became interested in developing a

common professional association known as the National Teachers Association (NTA),

sometimes referred to as the American Teachers Association (ATA). This group had

specific objectives, including the promotion of educational equity for the populace.

Essentially, the NTA was interested in institutionalizing publicly funded education to

ensure that all citizens could receive a basic education. According to Streshly and

DeMitchell (1994), the early organizers of the Union were involved in the common

school initiative.

Despite these accomplishments for social causes during the first 50 years of the

association (which included a national convention to address the effects of the Civil

War and advocating for the rights of African-American students in the 1870s), these

formative years were filled with many discrepancies in the institutionalized treatment

of women. Women were allowed to attend the conferences of the early Union, but

they were barred from speaking in or addressing the convention. In fact, only a few

women were allowed to join the association. It was a club for men. Put in frank

terms, the early teachers association did a very poor job of sharing organizational

power with women school teachers - despite the fact that women were the dominant gender in the teaching ranks (Murphy, 1990; Spring, 1990; Urban, 2000).

By 1870, the national teacher labor Union had merged with three other associations to create the NEA. At this time, the NEA viewed itself as a professional association, not necessarily a labor organization. Those who joined the NEA as decision-makers consisted of school heads, superintendents, and other lay people with a strong interest in public education. These members were almost exclusively males with interests in assuring that there was a cheap source of labor for the classroom. There is little doubt that the feminization of the teaching field, which has been discussed by numerous scholars (see the edited volume of Cortina and San Ramon, 2006), was propagated by the early association members. This is further explored in the earlier works of Urban (1982). It has been widely reported that women lacked the franchise to pursue other careers; teaching was one of the few options that women had to pursue a career. Due to women's relegated social status, they were often inclined to take low-paying teaching jobs (Kalhenberg, 2006).

However, these patriarchal organizational views and paradigms did not last long. Several women school teachers pushed the association forward by advocating for the rights of women. The early teacher Unionists were even described as the first educational feminists (Murphy, 1990, p. 61). By 1912, the teachers' Union had elected its first female president. By 1915, the NEA had publicly endorsed the women's suffrage movement, and key suffragettes (such as Susan B. Anthony) were regarded as school teachers and as members of the Union. By the beginning of the 1920s, women were key power holders in the NEA. For the organization to become a

powerful influence in the 20th century landscape of public education, it would have to endorse its primary constituents: women.

1900s

By the early 1900s, NEA leaders were discussing many issues within the field of teaching and learning beyond basic economics and teacher welfare. Early on, it was recognized that a professional advocacy group would be necessary for the survival of the profession, and one key player, Suzallo, began the process of leading teachers towards unified labor organizations (Urban, 2000, p. 3).

Suzzallo, a leading Union strategist, was a university professor in teacher education and an educational philosopher. He was at the forefront of understanding how to organize a professional labor organization to advance the causes of U.S. teachers. Having been fired from a previous university job, Suzzallo was well aware of the need for protections when taking controversial views in the classroom. Suzzallo was also keenly aware of the fact that a teachers' Union required more than just bargaining for what is often termed "bread and butter" issues. In 1913, in his seminal paper presented to the NEA annual conference, Suzzallo argued that a crisis existed within the American public school system. Suzzallo utilized many charged terms to advocate for the needs of teachers and the needs for school system reforms, including a description of the pathological, "educational machine" crisis of the American classroom. The crisis had to do with prescribed curriculums and little teacher control over the learning process, administrative control of teaching methodologies, and the reduction of teachers to the level of factory workers (Urban, 2000, pp. 3-7).

Classrooms were characterized as places where students were "drilled and grinded" via the powerful control that school administrators imposed on individual classrooms and teachers. Further, Suzzallo pointed out that many teachers were unable to cope with the influx of immigrant children who presented unique learning needs, as well as the burdens of over-crowded classrooms. Suzzallo contended that the Union would have to address two primary concerns. First, the economic welfare of the teaching ranks had to be dealt with as a primary issue. Without a professionally compensated labor force, the field of teaching was doomed from the start; the field would not be able to attract the best candidates into the classroom. Second, the Union would have to be deeply committed to the issues of teaching and learning. The Union would have to serve as both a professional association and as a medium for economic rights (including salary and tenure) (Urban, 2000, pp. 4-6).

The organizational ideologies of Suzzallo would become paramount to the mission of the teachers' association and are evidenced and elaborated on in the theoretical model that was proposed by McDonnell and Pascal (1979). Through the formation of professional groups, teachers could advocate for their needs and the needs of students. It was believed that the two were mutually supportive of one another. McDonnell and Pascal theorized that teachers' Unions would first address bread-and-butter issues of salary and benefits; second, move into issues of tenure and job security; and finally, move into issues of curriculum and instruction. This theory was supported in a follow-up study of Union policies (1980) and is largely reported in literature on teacher Unionism (Hess & Kelly, 2006).

By the beginning of the century, teachers were beginning to organize themselves all across the country to advocate for common needs (Murphy, 1990; Urban, 2000). Union chapters had emerged in almost all urban areas. These urban chapters were beginning to align themselves with national associations that could offer advocacy and political action. This was a task that smaller chapters could not necessarily accomplish through their own devices. The effects of changing economies, immigration, and urbanization led many teachers to want to take control of their careers through professional associations that could advocate for their specific and credible needs.

By 1916, two major Unions (professional labor organizations) were on the frontlines leading the teacher labor movement: the National Education Association (NEA) and the American Federation of Teachers (AFT) (Kalhenberg, 2006). Each national Union had its own particular strengths, weaknesses, and agendas (Murphy, 1990; Urban, 2000). However, by this time, both were regarded as teacher labor organizations and set about the business of organizing chapters across the country.

1920s

By the mid to late 1920s, school teaching was becoming a more respected career choice depending on geographic area and local community systems. This professional height in the life of American teachers has been widely chronicled by Murphy (1990). Simply put, there was growing acceptance amongst the American public for the idea of the *professional educator*. Well-paid teachers were becoming a norm in communities across the nation. Common values were beginning to emerge

amongst communities for school systems. Teachers were becoming respected for their contributions to these systems. It could even be said that teachers and schools were beginning to be viewed as community assets. Unfortunately, this height in public education was short lived. Teaching as a profession took a turn for the worse with the advent of the Great Depression (Murphy, 1990, pp. 141-149).

The economic conditions of the Great Depression deeply changed many positive trends in public education (Murphy, 1990; Urban, 2000). Essentially, highly paid professional teachers and brand new state-of-the-art schools became very unpopular given the economic condition of the country. Teachers were forced to deal with lowered salaries, increased workloads, and little community support. Of course, the best case scenario was a teacher fortunate enough to remain employed. The country was in economic crisis; teachers and Unions were not immune from the effects of this national disaster. As a result of this, both teaching Unions were forced to think about their strategies for survival during a major economic crisis. Each one developed a unique identity somewhat as a result of the Depression's onset.

The NEA moved towards policy and legislative activities, and abandoned its main political objective of creating a cabinet-level education position. This was in contrast to the AFT which merged with another labor organization, the American Federation of Labor Organizations (AFL) (Urban, 2000). The AFT did less work on the national education scene and began using practices associated with other labor organizations, and did much to organize large chapters in urban areas (Murphy, 1990).

1930s

One of the main priorities of the 1930s was equity for women and minority teachers (Urban, 2000). During this time, school boards were simply able to set a salary for individual teachers. Individual teachers would have no voice in their salary or other economic benefits. The teacher could accept what the school board offered or find another teaching position. As could be expected, there were great discrepancies between the wages of minorities and women compared with their male counterparts. Women would often work in elementary grades and men at the secondary level; secondary teachers were offered higher salaries and minority teachers, across the board, were paid less. The NEA began advocating for standardized pay schemes to eliminate biased pay systems to create equitable systems of pay. Interestingly, the AFT was not advocating for common pay schemes during this period.

1940s

During the 1940s, both teachers' Unions made systematic attempts to turn teacher rights into policy through political advocacies, labor negotiations, contracts, and chapter building campaigns. Most notably, this included creating working environments where the personal affairs of teachers were not the concern of the school district. One of the reasons for this pursuit concerned the very popular practice of dismissing women teachers who became married during their career. By the 1940s, the teachers' Union had publicly denounced this form of institutionalized discrimination and issued several reports to end this unfair labor practice. Other issues addressed during the 1940s included rights of academic freedom, the right for teachers

to incur debt, and the right to run for political office while being employed as a school teacher. It could be stated that the 1940s gave rise to teacher militancy through several successful strikes to obtain increases in economic compensation and through improvements in the basic employee rights (Murphy, 1990; Urban, 2000).

1950s

During the late 1940s and into the 1950s, the Union continued working for the rights of educators to be evaluated solely on their performance in the classroom. In order to understand the development of this important professional issue, it is critical to examine the cases of educators charged with communism in the New York City Schools, an event known as the Red Hunt. Again, this historical event is chronicled extensively by Murphy (1990).

This so called Red Hunt would have lasting effects on the way teacher Unions organized and advocated. During this historical period, many public school educators were required to take oaths of loyalty to the employing school district and the United States. One of the explicit intents of these oaths was to ensure that teachers were not engaging in non-patriotic activities – both personally and professionally. These loyalty oaths resulted in two issues. The first had to do with restrictions on teachers' private lives. Teachers were subject to the scrutiny of the community for their political and personal activities. The second had to do with restrictions on classroom activities and teaching. Teaching anything that contradicted an American economic and political system could be considered an act of sedition. Simply put, even teaching that other economic or political systems existed in a high school civics class, for

example, could be considered disloyal and result in termination. This left teachers as sitting targets for allegations of engaging in communist activities. At this point, no *just*-cause provisions applied to teacher employment, tenure, and promotion.

Fear of communism was a pervasive problem in the New York City school district; unfortunately, the teachers' Union was labeled a communist organization. Teachers took the brunt of the fallout from the McCarthy style hunt for communists in the teaching ranks. This issue was further complicated when many activities the Union was conducting became labeled as communist. Under extreme political pressure, in April of 1950, New York City School Superintendent Jansen called the entire board of the teachers association to his office. He had been under the watchful eye of a citizen group for not taking enough action to weed out communist groups and infiltrators (Murphy, 1990, pp. 185-195).

As a political move, he laid out his charges that the leaders in the teachers association were actively engaged in the communist party (Murphy, 1990, p. 187). He would satisfy his critics by going after several alleged communists, as he effectively put an end to the often bothersome teachers' Union. Despite that the individuals had been working towards progressive education curriculum, labor rights, teacher representation, and parent and community involvement in the educational processes, Jansen argued that these causes were clearly communist in nature and gave the accused teachers a directive to provide loyalty statements to the school board. Summarily, the association leaders refused to file the prescribed loyalty statements and were dismissed from their positions the following month.

Jansen's success at charging this strong group of teachers (and eliminating them from the professional ranks) only gave rise to further investigations and charges against teachers for being communists. Essentially, membership in the teachers' Union during this period often resulted in a career "kiss of death" (Murphy, 1990, pp. 189). The Union faced strong opposition to the point that superintendents of large public-school systems were willing to use whatever tactics and strategies were necessary to silence the emerging voice of teacher Unionism. The concept of educators being silenced for political advocacy is not unheard of. There is, in fact, an entire sub-field of scholarly studies devoted to the study of silencing controversial opinions and practices in public education (Lent & Pipkin, 2002).

1960s

By the 1960s, the Union was involved in the desegregation of schools and the integration of White and Black teachers' Unions - a major civil rights issue. As Kalhenberg (2006) has pointed out, the right for public school teachers to strike was also largely viewed as a civil rights issue (p.11). The Union had a strong interest in pushing civil rights cases, possibly for their own benefit. Despite the fact that both Unions were involved in some level of civil rights issues, Urban (2000) has pointed out that there were noticeable differences in how the two Unions dealt with these issues and responded to the civil rights movement (p.211).

During the 1960s, the NEA formed committees to look into racial integration, and commissioned some studies to look at the effects of desegregation. By the mid 1960s, as demonstrated by the fact that the NEA did little to advocate for the salary

and working conditions of Black school teachers, there was little advocacy accomplished in the area of civil rights (Urban, 2000, p. 213). The AFT took a more activist stance towards these issues and even voted to suspend charters to school-district chapters that would not work towards integration of Black teachers into the collective bargaining units. Further, the AFT allied with several key civil-rights groups to provide support to teachers who were in trouble for advocating integration and desegregation. The AFT ordered desegregation of its Union in 1955 (Urban, 2000, p. 212).

It was not until 1967 that the NEA became interested in pursuing these causes. A merger with the Association of Colored Teachers (ACTA), which produced immediate increases in Union membership, and the election of the first African American president, no doubt contributed towards a newly found interest in the topic of integration and desegregation. By this time, both Unions were working to take on issues of race equity (Urban, 2000, pp. 211-244).

1970s

By the 1970s, the teachers' Union was working on issues of collective bargaining and had largely won the right to organize professional labor associations with collective rights. The industrial model was becoming well established in the school system as the means to deal with issues related to teacher welfare and collective bargaining. During this time, however, a shift was beginning to take place in the minds of teachers toward the teachers' Union. Teachers needed economic welfare and benefits and improvements in the day-to-day routines of their jobs, such

as extracurricular assignments and specific job duties. It made sense for the Union to take on these issues as the representative association of the teaching ranks. As early as 1963 (Kalhenberg, 2006, p.13), teachers' Unions (specifically, the United Federation of Teachers, New York City) became increasingly interested in bringing issues of educational quality to the bargaining table. The Unions advocated for issues beyond *just* wages, hours, and working conditions to be introduced into the bargaining process.

The NEA was opposed to collective bargaining. Yet, with the success experienced by the AFT in the collective bargaining movement, the NEA was forced to implement collective bargaining practices (Hess & Kelly, 2006). Up until the 1970s, the NEA wanted to distance themselves from collective bargaining strategies, such as those of labor organizers. As a whole, the NEA viewed itself above the blue-collar labor movement and thought collective bargaining was distasteful and inappropriate for teachers. The NEA viewed itself as a professional organization, and not as a labor organization. The AFT on the other hand was spending considerable resources to solidify the ideals behind collective bargaining. Essentially, the 1970's was a time when teachers made great gains in economic status, due-process rights, and professional job descriptions (Murphy, 1990; Urban, 2000).

1980s

By the 1980s, both the NEA and the AFT had become fully fledged professional Unions that operated with systems of democratic government. The two Unions, although different, were accomplishing similar goals with regard to the

professional needs of teachers. The mission of both Unions was relatively solidified by the 1980s: the NEA and AFT were responsible for the economic welfare and working conditions of teachers. Teacher-working conditions were fairly standardized, due-process laws were in place, and the Unions' right to advocate for salary and benefits was firmly established. From an organizational perspective, through state-led affiliates and district-level chapters, the Unions were solidified with common goals across the country (Casey, 2006; Murphy, 1990; Urban, 2000).

After the above mentioned strides were made, Unionists began wondering about the continued issues of the developing teaching profession. Questions began to emerge in the minds of Unionists and teachers across the country:

1. Is a trade Union enough for teachers?

2. Could the Union also advocate for professional issues beyond economic welfare and teacher working conditions in other than isolated instances?

3. What is the next step in teacher Union development after basic professional necessities (such as, economic welfare, collective bargaining, tenure laws, standard working conditions, etc…) are met?

As Kalhenberg (2006) has pointed out, there were great advances being made to address issues other than working conditions at the bargaining table. Teacher Unions were starting to view themselves as possible agents of school change. Thus, New Unionism entered into the mix of literature related to teacher Unionism.

Historical Summary and Implications

As can be seen from the historical review, the teachers' Union has largely responded to social changes for the betterment of the teaching profession. The teacher-labor organizations have addressed important issues of equity, diversity, and socially-just practices on behalf of teachers across the country. US educators have organized themselves into two politically powerful labor organizations (NEA and AFT) that have demonstrated great capacity to influence public education.

This study was informed through a better understanding of the history of the Union. This understanding can be conceptualized on two levels. First, by recognizing that teacher Unions were once associated with the labor movement, we can understand that Unions have always played the role of teacher-advocate. We can also understand that those advocacy roles played an important component in developing equitable salary systems, employee rights, and fair labor practices. Second, by recognizing that the Union had to adopt industrial labor practices for organizational survival, we can better understand the historical context of the Union. Had the AFT not pushed for collective bargaining rights and moved forward with its labor strategies, the labor context of the American K12 system could be radically different than what is experienced today. Thus, one must recognize that the history of the Union is deeply rooted in industrial labor practices. Only recently have Unionists been seeking the next-step in labor organization. This next step is often referred to as New Unionism.

New Unionism in Theory

For this study, the ideological issues related to understanding New Unionism will be borrowed from the works of Kerchner, Koppich, and Weeres (1997). In this seminal work, leading researchers in the field of Unionism reported on the constructs associated with New Unionism from an eclectic and persuasive point of view. These researchers pointed towards a vision of public education where teaching is regarded as the highest level of attainment in the American educational system. While some might say that these researchers are overly idealistic and are part of the problem in educational reform (Lieberman, 1998), their works have nonetheless contributed towards innovative ideas in the field of teacher Unionism.

While it is impossible to reduce these concepts to a framework or model, a thorough discussion of the proposed constructs of New Unionism can be explored. By borrowing from Kerchner, et al, (1997) it could be stated that New Unionism hinges on two central ideals: (a) American educators must be promoted to the status of knowledge-workers in society at large; and (b) American educators must be committed to their own professionalism. This means school systems and educational leaders must be willing to begin the process of reform for educators to establish their broad rights and responsibilities as educators and as professionals. Urbanski and Erskine (2000) further elaborated this position by stating that teachers need to become responsible for this professional promotion:

> Teachers themselves must accept responsibility for change and see themselves
> as agents rather than mere targets of reform. They must champion sound
> efforts to improve instruction. The Unions and Union leaders must expand
> their view of themselves to include the role of leaders of reform. (p. 367)

Central to New Unionism are social and economic theories of post-industrialism. The term "post-industrialism" is generally attributed to the works of Bell (1973), a leading social scientist who made many observations about changing economic systems and their impact on society at large. A post-industrial society is thought of as an economic (or historical) period that follows an industrial era. It is generally accepted that the US began a post-industrial period following World War II through the 1950s, with Western Europe following shortly thereafter. When contrasted to industrial societies, post-industrial societies can be thought of as those in which the majority of employees are not involved in the production of tangible goods or resources. Thus, a main attribute of post-industrial economy is based on service delivery.

In a post-industrial society, the majority of workers are performing services rather than producing commodities. For instance, retail fields, technology, healthcare, and social services are all examples of vocations that are prevalent in a post industrial society. This change in economic conditions contributes towards and influences other changes in social beliefs - including how social power is formed, what is considered social power, and who is empowered. No longer is obtaining information powerful; rather, the ability to characterize knowledge becomes central to post-industrial social thought around issues of power and power-holders (Inozemtsev, 2001). The ability to define knowledge becomes a commodity. This is important to the New Unionist because: (a) New Unionists are seeking power within the complex K-12 educational system; and (b) New Unionists are attempting to deconstruct social beliefs that teachers are technicians (highly skilled workers). To elaborate, New Unionists would

argue that teaching expectations are largely based on the flawed belief that educators are producing a tangible asset: knowledge. Rather, New Unionists would argue that teachers are specialized service providers yielding a highly specialized skill to society: the ability to assist in the development of citizens ready for the post-industrial, global society (Kerchner, Koppich, & Werres, 1997).

Through the 1940s, the US adopted industrial labor relations for specific reasons. Several beliefs were adopted by teacher Unionists from the labor organizers and early blue-collar labor movements out of an industrial model of labor and organization. These beliefs spilled over into the teachers' Union practices through affiliation with the larger labor movement. It comes as no surprise that there has been polarity between management (school administration) and workers (teachers and other educators). It was assumed that a "win" for management was not a "win" for an employee. This led to the pervasive belief that management and employees had conflicting and competing interests in school systems (Wagner, 1991). New Unionists argue that this attitude is counter to the mission of public education and that, in management, school districts and teachers need to share common goals and visions (Koppich & Kerchner 2000).

Another important component of New Unionism is related to societal perceptions of the role of the educator. Kerchner, et al, (1997) have proposed that teaching should be inherently linked to knowledge generation; teachers should be considered *knowledge workers*. The entire labor organization of the field of teaching must adhere to the fundamental ideal that teachers are working for the advancement of knowledge. Merely filling the heads of students with skills and facts is inadequate for

the New Unionist. Educators should be teaching for the explicit purpose of developing cognitive skills in an emerging post-industrial society.

Kerchner, et al, (1997) have proposed that there is danger in promoting the idea that teaching is a technical act. As long as teachers are working in systems that promote technical teaching performances, they will be relegating themselves to the level of technicians. It was further pointed out that many in American society simply view the profession of teaching as a technical trade that can be performed with the right set of technical conditions being met. While this may or may not be an accurate reflection of the entire US public, many would agree that there are negative social perceptions of teachers that lead toward difficulties in effectively advocating for the needs of teachers and learners (Cameron, 2005).

It is theorized that this perceived worldview is, to some extent, mediated and influenced by the industrial model of teaching that has been largely propagated by attempts to standardize curriculum and instruction in the K-12 system (Kerchner, Koppich & Werres, 1997). It was further theorized that this potentially pervasive worldview in American culture has been propagated by the industrial era model that teaching has adopted throughout the 20th century.

New Unionism criticizes strong behaviorist perspectives toward the curriculum and believes that "canning" curriculums has created environments where the general public views teaching as merely a technical performance. In other words, teaching has become similar to factory productions in an industrial era.

Another way to conceptualize the broad issue of whether teaching is a technical trade is to consider the idea of whether or not teaching is a profession or

merely a skilled craft. Considering an earlier work of Kerchner and Cauffman (1995), the issues related to this question can be addressed. Essentially, Kerchner and Cauffman have argued that teaching has gains to make before it can be considered a full-fledged profession. While many teachers may disagree, considering this from a sociological or legal policy perspective has merit. Kerchner and Cauffman have pointed to the ways in which teachers and schools conduct business and provide comparisons to other professions. Simply put, teachers do not enjoy many of the benefits experienced by other professions, including professional autonomy, a well-defined knowledge base, and access to control (both in the micro sense related to functioning of schools on a day-to-day level and on a macro sense in the reality that individual teachers are rarely consulted on matters of district policy, programs, and practices). This is further complicated by the fact that teaching has long been associated with two marginalized groups: women and children. This has created a situation where social agency may not exist to advocate for the needs of public schools without serious educational reforms.

It is proposed that necessary professional gains could be made by utilizing a common professional association that dealt with both professional issues (curriculum, instruction, tenure, promotion, etc…) and economic benefits (wages, healthcare, etc…) to secure a skilled work force. An important, central argument of New Unionists is that by allowing this limited view of teaching to propagate itself, teachers will be unable to advocate successfully for their professional needs (or their positions) as *knowledge workers* with a responsibility of educating citizens for post-industrial society (Kerchner, Koppich, & Werres, 1997).

Interestingly, several central tenants of New Unionism are not dissimilar to the leading works of critical education theorists. These critical theorists, like New Unionists, are deeply interested in understanding power-structures, liberations, politics, and democratic processes in K-12 systems (for example, consider the well-known works of Friere, 1998 and Giroux, 1988).

To summarize, New Unionism could be described as a labor movement that seeks to professionalize the teaching field and improve the conditions of public schools through systematic reform and ideological changes. The mechanism by which this happens is through the bargaining process that already exists within public education agencies. New Unionists are working for teachers to exercise their considerable political power to create educational reforms through the Union process. Further, New Unionism rejects the central tenants of the industrial labor movement and finds that teachers must create their own specialized Union for a post-industrial society. New Unionism calls for educational reforms beginning with the organized labor Union.

New Unionism in Practice

After reviewing the history of the teacher-labor movement and looking at the emerging theoretical perspectives of New Unionism, it is important to ask several questions related to scholarship in this area. This dissertation was not just interested in the broader theoretical arguments of New Unionism or in promoting one practice over

the other. This study was particularly interested in exploring and understanding existing studies that document practices of New Unionism.

The above stated objective leads to several questions which can be conceptualized on two levels. (a) What are the actual practices of New Unionists? What is it that New Unionists do that other (primarily industrial labor Unionists) do not do in teacher Union organizations? What does New Unionism look like in the K-12 system? And, (b) what scholarly research studies exist to support practices in New Unionism endeavors? In other words, what do the studies show and/or what evidence exists related to new Union practices?

While New Unionism may have its origins in theoretical and philosophical perspectives in the labor Union movement related to the profession of teaching, it is further concerned with several issues in the daily operations of public schools. Broadly speaking, if we were to break down New Unionist labor practices, these practices could be classified into three areas: (a) Teacher evaluations related to quality of instruction, tenure, promotion, and induction (Koppich, 2005; Lieberman, 1998); (b) collaborative bargaining strategies to include issues that have predominantly been management prerogatives, such as quality of educational experiences (Casey, 2006; Kalhenberg, 2006; Kerchner, Koppich, & Werres, 1997); and (c) economic incentives for the teaching ranks that are not based on the industrial model pay scales of seniority and education (Koppich, 2005).

Teacher Evaluations

Consider the case of the Toledo School System which was the first in the nation to adopt practices related to New Unionism in the mid 1980s (including programs for teacher evaluation) (Goldstein & Noguera, 2006; Lieberman, 1998; Lopez & Balzer 1996). Essentially, this undertaking was an organizational experiment in teacher evaluations. The outcomes are interesting and highly notable. These outcomes continue to be widely discussed in the popular and scholarly literature related to New Unionism.

One of the central ideals of New Unionism is the right for the teaching profession to police its own ranks - with the premise that teachers are more aware of non-effective instruction than any other participant within the school system. During the early 1980s, the Toledo School System decided to make some radical changes in their administrative practices. The president of the local Toledo teachers' Union was at the forefront of the movement. The focus of the changes had to do with quality of education. The school district was faced with some tough choices about how they were conducting teacher evaluations.

Historically, teachers have not been evaluated by their peers; rather, most school districts have adopted some form of regular review by principals or other instructional leaders from management ranks. However, there is strong evidence that administrative evaluations lack fidelity (Tucker, 1997). Further, there is a wide variety of literature on ways to evaluate teachers effectively (Beerens, 2000; Eady & Zepeda, 2007) and on ways to remove ineffective teachers and specialists from the classroom (Carey, 1981; Lawrence & Vachon, 1997). However, these guides related

to teacher evaluation rarely require peer assistance. The pervasive paradigm in K-12 education is that non-effective instructional faculty will be dealt with through management-driven evaluation processes. This has led to situations where time-burdened principals have little confidence in their ability to judge effectively the performance of possibly ineffective teachers.

While many might be looking at Toledo as an example for technical or procedural issues with peer review programs, others are considering the conceptual issue: teachers were allowed to evaluate each other with limited interference from site-based administrators. Teachers were given the rights to set their own standards for quality in their district. Teachers were also trusted by school leaders to take responsibility for their future colleagues and possibly incompetent current colleagues (Goldstein & Noguera, 2006; Koppich, 2005).

The results of the changes initiated in the Toledo schools were two-fold. First, the school district had to develop some kind of ongoing plan to evaluate veteran teachers who had historically received little or no feedback on their teaching skills. The school district was criticized for having veteran "dead-weights" in the teaching ranks. Second, the district had to develop some kind of system to evaluate new teachers. In an interesting arrangement, the teachers' Union advocated to sponsor a program that allowed teachers to evaluate each other, both at the ranks of new teachers and contracted (tenured) faculty members. The entire evaluation process was to be turned over to the teachers. No longer would any single administrator decide the career fate of any teacher. Classrooms were now subject to peer review processes that

were not dissimilar to university peer review processes (Kerchner, Koppich, &

Werres, 1997).

According to Union officials, the outcomes for the majority of the senior staff

members were largely positive. The Toledo school system began a program to

provide interventions for teaching staff deemed to be detrimental to the function of the

school; this was a rare group. A teacher could be placed in the intervention program

only if the site administrator and the site Union representative agreed that the teaching

competencies of the veteran teacher were less than meeting the standards. Otherwise,

the teacher was basically free to function as a professional educator with little concern

for their future employment. No teacher would be placed into an intervention program

without the approval and agreement of the Union (Kerchner, Koppich, & Werres,

1997; Lopez & Balzer, 1996).

Once a teacher was placed in an intervention program, the teacher would be

able to keep their position and demonstrate teaching competencies with the assistance

of a teaching mentor – a district teacher who would coach them and help them develop

the teaching skills necessary for continued employment. At the end of the intervention

period, the teaching mentor would take the case to a committee in the district with all

of the evidence. The committee would then review the performance of the teacher to

determine whether or not the teacher had met the requirements for continued

employment (Kerchner, Koppich, & Werres, 1997; Lopez & Balzer, 1996).

A similar approach was used for beginning teachers. New teachers were

placed into an internship program and assigned a mentor who would spend hours with

the new teachers in their classrooms. The mentors would provide technical assistance,

guidance, and support for the new teacher. The new teacher would be evaluated by the mentor and have the case for tenure taken to a district committee. At that time, the committee would determine whether or not the new teacher had met the requirements for continued employment and tenure (Kerchner, Koppich, & Werres, 1997).

During this time, the district found it was able to remove low quality teachers with greater ease and efficiency. When teachers were given the rights to police their own ranks, they were much more likely to eliminate poor teachers, both at the senior level and entry level. As a result of this interesting trial, the process of peer review has started to become well known and widely used as a practical and appropriate means for teacher-professional development (Goldstein & Noguera, 2006).

Simply put, teachers are more likely than administrators to remove poor-quality colleagues from the classroom. In an original and significant study of this trial of teacher induction, Lawrence (1985) demonstrated that during the first five years preceding the implementation of the peer review program only one new teacher was refused a new teaching contract due to poor performance in the entire Toledo system. During the remainder of the time the program was in effect, nearly six and a half percent of new teachers were not tenured and renewed as a result of their inadequate growth as classroom educators. The pervasive fear that teachers would protect *their own* was simply untrue (Kerchner, Koppich, & Werres, 1997). Unfortunately, for purposes of comparison, there have been no scholarly studies to document how many incompetent veteran teachers were removed from the classroom.

While the evidence to support teacher-led peer evaluations is not clear, it has become popular in certain parts of the country (see Goldstein and Noguera, 2006).

What teachers believe about peer evaluations remains unclear, as evidenced by the lack of scholarly studies to understand perceptions and beliefs around peer review programs.

Collaborative Bargaining vs. Collective Bargaining

Collective bargaining, which became popular in the 1960s, can be conceptualized by thinking of bargaining that exists to standardize teacher working conditions related to basic issues such as wages, benefits, and working conditions across schools within school districts. Collective bargaining is the process by which teachers organize and communicate their needs and demands through standardized processes to school district administration. Further, these standardized processes allow the district management to communicate their wants and demands to the teaching ranks (Bascia, 1994; Streshly & DeMitchell, 1994; Wagner, 1991).

Collaborative bargaining, on the other hand, seeks to create dynamic and flexible teacher contracts that can have great variability from school building to school building within a particular district. Further, collaborative bargaining focuses on finding mutual interests, goals, and organizational ideals. Collaborative bargaining is interested in bringing issues directly related to student learning and educational policy to the bargaining table. In other words, teachers must also bargain for the best interests of learning and the teaching profession. Some literature has been devoted to understanding the best strategies for bargaining between teachers and school districts (Kerchner, Koppich, & Werres, 1997; Koppich, 2006).

Further, collaborative styles of bargaining are concerned with the highest level of bargaining (see Table 2.1) in which employers and employees can engage during

the labor negotiation process. They are characterized by commitment to interests, not

positions, and the focus is on problem solving for mutual gains. It has become

commonplace in K12 systems to employ collaborative tactics when bargaining over

workplace issues.

Collaborative bargaining often turns into reform-based bargaining, as

described by Koppich (2006). This style of bargaining brings issues of educational

policy to the bargaining table and allows for employers and employees to adopt

mutual goals focused on student learning gains. Collaborative bargaining rejects the

idea that both parties will compromise, and embraces the idea that all parties will have

mutual interests and common goals. According to collaborative bargaining, there is a

win for the employee and a win for the management, and vice versa.

Considering the works of Parker (1984), we can see that there are several

possible bargaining scenarios deeply dependent on the culture of the school district

and the Union. By the 1990s, several districts were beginning the process of

collaborative bargaining, a process that requires deep commitment from both parties to

support the rights of the other (Wagner, 1991). Parker proposed a five phase model of

bargaining that has been widely adopted by Unionists and allows Unionists to consider

the overall bargaining relationship between an association and a school district. The

following table illustrates the Parker Model.

Table 2.1. *Parker Model.*

Paternalistic	This style of bargaining focuses on the power held by the superintendent or other chief school officer. Generally, there are positive relationships; however, the only party with real power is the school district and its chief officer. The chief officer assumes full responsibility for the needs of the school district employees. Yet, the chief officer manages employee conduct at all levels.
Enemy	This is the style of collective bargaining that could be characterized as *open hostility* by both parties towards each other. Very much based on industrial models of labor management, it is believed that each party has competing interests. Negative strategies are employed by both parties.
Adversary	There is strong resistance from both bargaining parties. Each party would like to see the other party eliminated. Tolerance is employed; true issues are not necessarily addressed.
Advocacy	In this style of bargaining there is recognition of the other party. Each party maintains itself through strong defense and support strategies. Focus is on positions, not necessarily interests. Both parties are non-challenging or non-threatening to the other party.
Collaborative	There is a strong mutual acceptance of the other party. Both parties recognize the legitimacy of one another. The focus is on problem solving issues and interests. No threats are employed. There is willingness to leave behind advocacy based relationships in order to meet the needs of both parties. This style of bargaining can often lead to bargaining where positive educational reforms are made in a collaborative process.

A case in point related to collaborative bargaining is the Rochester School District located in New York (Urbanski, 2003). This particular district has made serious commitments to engage in collaborative bargaining practices -- practices which look largely like the kinds of bargaining practices that Parker discusses in his collaborative model. This includes addressing issues of teacher quality, tenure, curriculum issues, and site-based management.

This particular school district has demonstrated collaborative bargaining processes across nearly every function of school operation and has developed a bargaining model that is being implemented across the country partially through the creation of a Union-reform organization known as the Teacher Union Reform Network (TURN). TURN has served as a kind of organizational experiment and has been discussed by Urbanski (2003). In detailed summaries of the practices of Rochester, Urbanski (2003) has outlined the attributes and outcomes of collaborative bargaining processes and his largely reported outcomes have had a significant impact on virtually all functions of the school system related to teachers and working environments.

The above section contributes towards the present study by providing readers with a broad definition of collaborative and reform based bargaining processes which is important for an operational understanding of the construct. Additionally, these broad definitions were adopted in the present study by informing the survey instrumentation. Several items on the survey instrument were directly adapted from the literature findings that are discussed in this section. Moreover, the above section provides readers with the awareness that collaborative strategies appear to impact schools in a positive way. Thus, reform based bargaining processes may be a worthwhile effort.

Salary Structures: Alternative Forms of Pay

The third area that New Unionists are largely concerned with is that of teacher-salary structures and economic incentives. Koppich (2005) has tackled the subject of

alternative forms of teacher pay through documentation of the effects of alternative forms of pay in certain K12 systems. Moreover, the 2004 report from the Teaching Commission (Teaching at Risk, 2004) called for the following alternative pay structures: (a) premium pay for shortage fields (math, science and special education); and (b) incentives for high teaching performance.

These salary ideas are largely rejected by teacher Unions, as Koppich (2005) pointed out. The Union often cites research that suggests these pay structures "contribute towards a culture of isolation…, set quotas…, and establishing only a few to receive the added compensation" (Koppich, 2005, p. 101). Research reports by Bacharach, Lipsky & Shed (1984), and Murnane and Cohen (1986) are cited to support these Union conclusions. Yet, in the pilot study reported by Koppich (2005), alternative plans for payment are having significant and notable impacts.

Koppich (2005) has reported that one of the most prominent pay-for-performance plans was implemented in the Denver Public Schools beginning in 1999, after much interest from public policy makers and another neighboring district's similar initiative. Schools were required to participate in the plan if 67 percent of the faculty voted for its support. As part of the plan, each teacher was required to develop objective learning outcomes for students beyond the regular curriculum. If those supplementary objectives were met, there would be a small financial stipend of over $700.00 per objective awarded to the teacher. Determining whether objectives were met was subject to bargaining rules, as school principals could have their decisions appealed. Interestingly, to date, there have been no appeals, and all teachers have met their professional objectives for supplementary pay.

Koppich (2005) reported the following summary outcomes on the outcomes of this study in an exhaustive report published by a technical service provider (Community Training and Assistance Center):

1. Students at all levels showed increases in academic achievement during the implementation of this pay-for-performance plan;

2. There was a relationship between rising achievement of students and length of teacher time in the alternative plan;

3. Quality of objectives and increased ability to meet stated objectives increased while teachers stayed in the pay-for-performance plan; and

4. Overall, there was an increase in district and teacher focus on improvements in student achievement. There were multiple positive outcomes for providing bonuses to teachers for going beyond routine teaching practice (Koppich, 2005).

One of the outcomes for this pay-for-performance program is the creation of a district task force on salary. The central tenant of this task force is to: (a) examine issues related to compensation, including pay-for-performance (motivating salary plans) and (b) consider the financial impacts of various plans, including feasibility. The results of this task force now include an entire new salary schedule system (Koppich, 2005) that provides for innovative salaries to high-performing teachers. The positive influence that teacher salaries seem to exhibit on student achievement has been largely confirmed in other reports (Johnson-Moore & Donaldson, 2006).

In summary, there appear to be benefits to exploring alternative ways to pay teachers. Yet, what teachers want in relationship to alternative pay plans is largely

unknown. Moreover, teacher perceptions of alternative pay plans remain unknown.
Thus, we see the definitions and examples of alternative salary structures contributing
towards an overall understanding of post-industrial labor reforms. Additionally, we
see evidence that the reform effort may positively impact school functioning.

Summary

By analyzing the practices of new-Unionism, we can see that there are three
distinct labor strategies that new-Unionists have adopted: (a) alternative compensation
plans; (b) peer review programs; and (c) collaborative bargaining strategies. Three
distinct labor reforms have now been operationalized as "post-industrial" labor
practices. Thus, a framework for post-industrial labor models has been developed.
Analyzing the practices of new-Union leaders, through the published literature,
provides a solid framework for understanding the labor trends in new-Unionist circles.
Moreover, it provides the basis for the survey items (see chapter three). Particularly,
all items on the instrument were directly adopted from the definitions utilized in the
literature review. All of the items were developed by utilizing the definitions, themes,
and constructs that were explored in the research literature.   Thus, there is a direct
link between the survey items and the research articles on the topic of new-Unionism.

Unionism in Oregon

It is important to understand the contextual issues for this study. This section links the above practices in Unionism to the State of Oregon and provides the reader with an understanding of the contextual implications for this study.

Oregon educators are represented by the Oregon Education Association (OEA), an affiliate of the NEA. There are no affiliates of the AFT in the state of Oregon (OEA, 2007), except for a small local chapter of special education service providers in the Portland metro area. The OEA has a membership of approximately 46,000. According to the Oregon Department of Education, there are approximately 28,000 classroom teachers in the state of Oregon. The remaining 18,000 individuals are employed in other related professions (counselors, psychologists, community college employees, paraprofessional educators, etc).

Peer Review Programs

Peer review programs in Oregon do not exist. The legislature has enacted legislation that specifically bars teachers from evaluating other teachers. In order for a person to be qualified to evaluate other educators, that individual must hold an administrative credential and may not be in the same bargaining unit as the individual being evaluated (Oregon Revised Statutes 342.140, 2007).

This is in sharp contrast to other states where peer-review programs have been successfully implemented. In these states, regulatory oversight allows for peer review programs in K12 educational settings.

Alternative Pay Structures

The alternative pay structure area has recently received attention in the State of Oregon. A recent report by the Oregon School Board Association (OSBA) highlighted the pros and cons with performance pay plans and provided general advice to school boards on the complex issue (Oregon Performance Pay Plans, 2007). Essentially, the OSBA has adopted an official policy that performance plans warrant further investigation as a part of a complete compensation package for certified staff members. In this report, the OSBA provided a few anecdotal examples of ways in which Oregon school districts have started utilizing pay-for-performance plans. For example, they highlighted how a mid-Willamette Valley school district was utilizing an alternative form of compensation.

Collaborative Bargaining vs. Collective Bargaining

The decision for a school district and employee association to enter into collaborative bargaining processes is mutual. The style of bargaining that is employed is left to individual district discretions (PECBA, 2007). As stated in the literature review, both parties must agree to this form of bargaining process. In Oregon, the process for collaborative bargaining is widely varied depending on the district. Simply put, some districts have adopted collaborative bargaining practices while others have not. All districts are required to have collective bargaining in place for staff members. Unfortunately, there are no published reports on the prevalence of collaborative bargaining strategies for Oregon.

Another way to look for evidence of collaborative or reform based bargaining is to look towards the state-labor association goals and objectives. A review of the OEA goals and objectives for the 2006-2007 school year shows that the primary goals and objectives for the state organization relate to advocacy issues and sustainable funding. As a statewide organization, there have been no commitments toward reform bargaining or collaborative strategies within local districts (OEA, 2007). Finally, according to the Teacher Union Reform Network (2007), the largest association of Unions affiliated with collaborative strategies, there are no school districts in Oregon participating in the national collaborative reform strategies. However, that does not imply that many school districts do not enjoy collaborative relationships between management and teachers. The extent to which that occurs has yet to be documented.

Other Important Factors

The state of Oregon has been plagued with severe budget problems related to K12 and higher education funding and has a complex history related to public schooling, particularly in the area of funding. In 1990, Oregon voters enacted a levy known as Ballot Measure 5. Essentially, Ballot Measure 5 created statewide funding structures for Oregon public schools and enacted property tax limits which radically reduced the funds available for the operation of public schools. This, coupled with the lack of state taxes, has created funding strategies for public schools that are generally less than adequate. Many school districts in the State or Oregon have to budget funding for school expenditures before the actual school budgets have been determined by the legislature. (For more information on the issue of state funding and how it impacts teaching staff members, see the recent research by Cohen, et al. 2007).

These historically severe budget problems make "experimentation" with labor reforms a non-priority to many Unions in Oregon. According to the works of McDonnell and Pascal (1979), teachers' Unions will first work for basic "bread and butter" issues prior to addressing issues of educational policy. Thus, it is highly likely that the local chapters of the teachers' Union have been largely involved in issues related to the economic welfare of educators.

The State of Oregon is a collective bargaining state. Collective bargaining is mandated by state law for all public employees. Further, Oregon has its fair share of statutes which provide that all teachers in Oregon are required to pay Union dues whether they join the Union or not. There are provisions that allow for educators to send their Union dues to charitable organizations if they are not interested in financially supporting the Union. However, there is no economic benefit provided for not joining the Union; put another way, teachers do not save money by forgoing Union membership (Oregon Legislative Issue Brief, 1998).

Contextual Conclusions

The status of teacher-labor relations in the State of Oregon probably remains in the industrial labor relations camp, partially from theorized necessity and partially because of State policy mandates. The only published instances of post-industrial labor reforms are a few isolated instances of pay-for-performance plans (alternative salary structures) in less than five districts out of 199 districts (Oregon Performance Pay Plans, 2005). These contextual implications for this study are important to consider. Many teachers may not be aware that Unions across the country have

worked towards other educational processes besides economic welfare bargaining.
Given this evidence, it is fair to say that Oregon has maintained industrial labor
relations.

The context presents significance for this study on two levels and is important
to address. On the first level, one is able to understand the context of the present
study, since understanding the context provides an anchor to frame results and discuss
outcomes. On the second level, it is important to recognize that many educators have
probably never been exposed to post-industrial labor relationships in the State when
analyzing what educators believe about post-industrial labor relationships. Thus, the
results can be further interpreted to understand how educators in a fairly industrial
labor market view post-industrial labor reforms.

Summary and Implications for this Study

There are key sections of the review that contribute towards this present study.
First, the historical review showed the development and implementation of the Union
in American public schools. This allows readers to understand the broader historical
context from which the Union emerged. Additionally, this allows the reader to
conceptualize how and why the Union adopted labor organization strategies and how
those labor strategies became pervasive across the country.

Moreover, the literature review documented that social changes are occurring
and the Union may need to respond to these post-industrial social changes for
purposes of sustainability. These social changes have significantly impacted how

services across multiple sectors are delivered. It is highlighted in the theoretical review that the Union is not immune or exempt from these social changes and their broad implications. Thus, a theoretical understanding of how social change impacts Unionization was explored.

The literature review also framed the specific labor reforms that are occurring and provided readers with operational constructs, through published studies, to understand the labor reforms. This is useful for understanding how the study was designed (see Chapter Three) and for understanding the exact constructs being assessed. Moreover, the research literature on the individual topics was summarized.

Finally, the literature review created a context for understanding the labor climate in the State of Oregon. This is particularly useful for helping frame the research results and the discussion (see Chapter Five).

Essentially, this literature review leads to the following conclusions guiding the present study: (a) the teachers' Union is a dynamic social agency that will respond to social change as well as educator needs; and (b) New Unionism is a labor movement that is responding to post-industrial social changes with specific emerging practices. This teacher-led labor movement has forced the Union to consider set-in-stone strategies and practices for labor organizations, as well as to explore alternative ways (in this case, post-industrial ways) of conducting business on behalf of professional educators.

Further, there are three general findings in the research related to New Unionism: (a) peer review programs might be an effective tool for evaluation of K12 staff members, despite criticisms (Goldstein & Noguera, 2006; Koppich, 2005;

Lieberman, 1998); (b) collaborative bargaining, at least anecdotally, appears to have some positive impact on school climate and functionality (Urbanski, 2003; Wagner, 1991); and (c) alternative forms of teacher pay appear - in isolated instances and under certain conditions - to increase student achievement and have the capacity to focus district officials and teachers on student learning (Koppich, 2005).

The results of the contextual analysis inform this study in several ways. First, there is no evidence that Oregon educators are even interested in labor reforms. In Oregon, labor reforms are largely unreported. All labor reforms to date have taken place in isolated school systems across the country. Considering the fact that the Teacher Union Reform Network currently has 50 member districts, it is easy to observe that actual reforms across the country are slow moving. As mentioned above, there are no Oregon districts that are members.

Moreover, the results of the research of Johnson-Moore (2007) have shown that teachers in American public schools are only interested in labor reforms to the extent that reforms will improve the functionality of the school systems. One could infer that teachers may not even be paying attention to the reform efforts that some districts are making unless there is a direct impact in their daily working lives.

It should also be pointed out, the literature search revealed economic studies that were not included in this particular review. As mentioned in Chapter One, there is an ongoing debate amongst economists on whether or not teachers' Unions have merit from an economic perspective (Goldhaber, 2006). Simply put, there are some researchers who believe teacher Unions' may be standing in the way of educational reforms by soaking up monetary resources (Hoxby, 1996; Kurth, 1987). The fact that

there are only three well documented studies to examine perspectives related to teacher Unionism is potentially alarming (Clark, 2000; Johnson-Moore, et al, 2007; Murray, 2000).

Finally, the literature reviews indicate that teacher Unions are a hot topic in the field of education. Simply put, little is known about the teachers' Union from a scholarly perspective. Nothing is known about the teachers' Union in the state of Oregon. What is known, in a general sense – related to Unions across the country – is highly debated. Thus, the need to turn to teachers to inform and define Union practices, policies, and goals is warranted and appropriate. On a broader scale, Oregon is not dissimilar to many other states in relationship to its industrial labor model. As mentioned previously, there are only 50 school districts in the entire United States interested in making progressive labor reforms based on post-industrial labor models(as measured by enrollment in the TURN network). Thus, the data that are collected in Oregon may have implications for other State labor organizations as well.

Considering the presented issues, one central research question was developed: to what extent do Oregon educators find merit with post-industrial labor reforms? In particular, to what extent do Oregon educators find merit with peer review programs, alternative salary systems, and collaborative bargaining strategies?

CHAPTER THREE

METHODS

The general purpose of this chapter is to frame the research methods that were used in this particular study. This chapter has two related objectives: (a) to describe the research perspectives; and (b) to describe the methodology and logistics that were used to answer the research questions - including a description and rationale for the quantitative and qualitative data collection tools.

Research Perspectives

Scientific surveys have been widely recognized as a tool in both social science and organizational research (Rea & Parker, 2005). Further, survey research has been largely accepted by educational researchers as a popular method for quantitative research projects (Gall, Gall, & Borg 2007). An underlying assumption of this research is the fact that behaviors, opinions, and attitudes can be measured - albeit imperfectly - and these measured constructs have value. As such, a post-positivist perspective has been adopted.

This research makes no claims to establish absolute truth related to teacher perceptions of post-industrial labor reforms within the state of Oregon. Rather, through quantitative analysis, this research begins the lengthy process of understanding what teachers generally believe about specific labor reform (change)

practices. Gall, Gall, and Borg's (2007) definition of post-positivism seems

particularly fitting for this research project:

> Various weakness of the positivist approach to social science research became apparent over the last century, resulting in a modified form of positivism called post-positivism. Post positivism is an epistemology that assumes an objective reality, but that this objective reality can be known imperfectly. According to post positivism, theories about objective reality cannot be validated in an absolute sense…. (p. 16)

The point of post-positivist research is to get closer to the truth of any given

topic through the research and discovery process while acknowledging that absolute

truth is impossible to find. Further, a central tenant of post-positivism is that research

has limitations that will never fully lead to the perfect understanding of any given

topic or inquiry, due partially to human bias in the research process and to the

underlying philosophical belief that truth is subject to individual perception.

It would be difficult, and almost impossible, for any study to make a claim that

absolute truth related to teacher perceptions of labor reforms has been found. Labor

reforms are complex and dynamic. As demonstrated in the literature review, labor

reforms are non-standard. In addition, teacher opinions related to labor reforms are

largely not understood in scholarly circles.

Instrument

In order to conduct a large scientific sampling of Oregon educators' beliefs

towards post-industrial labor reform efforts, a tool was developed based on Rea's and

Parker's (2005) sampling procedures. Rea and Parker point out that survey research is

concerned with three critical domains: (a) attitudes; (b) opinions; and (c) behaviors.

Essentially, this tool incorporates these three domains of survey research, with a heavy bias towards the domains of attitudes and opinions.

Post-industrial labor reforms can be operationalized into three observable labor organization practices. To review, these operational constructs are: (a) alternative pay structures; (b) collaborative bargaining (also known as interest based bargaining); and (c) peer review processes in K-12 school systems. (The specifics of these practices are found in Chapter Two and are easily described.)

As such, to begin the survey process related to these constructs, instrumentation starts with three overarching questions:

(a) What are the attitudes that teachers hold towards post-industrial labor reforms versus industrial labor relationships?

(b) What are the opinions that teachers hold towards post-industrial labor reforms versus industrial labor relationships?

(c) What are the behaviors that teachers would engage in related to post-industrial labor reforms as opposed to the current model of industrial labor relationships?

A large amount of data can be gathered to determine whether Oregon Educators find merit with post-industrial labor reforms in a standardized manner by developing an instrument that addresses these three questions. Due to the nature of this study, a heavy bias towards opinion and attitudes can be observed in the quantitative measure. Or, put in more simple terms, the survey did little to capture behavioral indicators of teacher beliefs' related to labor reforms. A more thorough explanation of this limitation is warranted.

According to Rea and Parker (2005), a study such as this is essentially more concerned with the first two domains (attitudes and opinions) of survey research. This is largely due to two factors: (a) this research endeavor is a study that is specifically concerned with attitudes and opinions; and (b) there are better ways to capture educator behaviors besides posing hypothetical situations and asking for potential behavioral responses. For example, asking an educator whether they would leave a position in a school (a behavior) if a labor reform occurred might not be as effective of a measure as actually looking at attrition rates in schools where labor reforms have occurred. Thus, this particular instrument was heavily biased towards opinions and attitudes.

The instrument began with a description of the study and other issues related to informed consent. Participants were thoroughly informed on the nature of the study according to the best practice recommendations of Czaja and Blair (1996) and Rea and Parker (2005). This allowed the subjects to fully consider their responses and provide thoughtful answers related to the study objectives. By making respondents aware of the general research objectives (in this case, Union reform) participants were more likely to participate and provide needed information.

Instrumentation

Following the study information, the survey moved into the direct measurement component of the study. As the key research questions indicate, there were three constructs that were assessed, and each of those constructs drove a subtest.

Priming items and reverse coded items were employed within the context of a four-point Likert scale. Educators across the state were asked to respond to each item as: (a) strongly disagree; (b) disagree; (c) agree; or (d) strongly agree. Some items were designed to capture the post-industrial constructs; while other items were designed to capture what could be considered industrial constructs.

Alternative Salary Items

Subtest One asked 10 questions directly related to pay-for-performance. The questions were directly taken from the studies explored in the literature review. For instance, the first item, "educators should be compensated for increases in student performance," was taken from the themes explored in the Koppich (2005) study which identified the benefits of incentive programs for enhancing academic achievement.

The items were administered utilizing a randomized strategy. This helped control for possible factor errors as a general research recommendation. This strategy was utilized on all three sub-tests. Fortunately, the features of pay-for-performance are fairly standard and are widely discussed. (see Chapter Two).

The 10 items that were developed were reviewed by two experts in the field (one a scholar and the other a policy practitioner) and were piloted with a small convenience sample of 17 practicing educators. Changes were made to the items to create clarity or eliminate awkward wording. The final 10 items are included below in Table 3.1.

Table 3.1. *Final Items for Alternative Salary Subtest.*

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1) Educators should be compensated for increases in student performance.
2) Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.
3) Student performance provides objective criteria for pay-for-performance. Standardized achievement test results are indicators of teacher performance.
4) I would be comfortable with my salary being tied to student performance.
5) I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.
6) I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc...).
7) Teachers new to the profession should have options for advancing the salary schedules at a faster rate.
8) Teacher education level (graduate coursework, advanced certificates, etc...) should be used to determine educator salary level.
9) Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.
10) Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.

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Collaborative Bargaining

Subtest Three asked several questions directly related to the collaborative bargaining process. The questions were also directly taken from the studies explored in the literature review (See Chapter Two). For instance, question three asked, "Bargaining is a tool to establish sound policy." This item was taken directly from the themes explored by Kerchner, Koppich, and Werres (1997).

The 13 items that were developed were reviewed by two experts in the field (one a scholar and the other a policy practitioner) and were piloted with a small convenience sample of 17 practicing educators. Changes were made to the items to create clarity or eliminate awkward wording. The final 13 items are included below in Table 3.2.

Table 3.2. *Final Items for Bargaining Subtest.*

1) Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.   2) Teacher Unions should only bargain for economic necessities such as salary and benefits.   3) Bargaining is a tool to establish sound policies.   4) Teacher Unions' first priorities should be related to learning needs.   5) Teacher Unions' first priorities should be related to teacher needs.   6) Teacher Unions should be creating and advocating for systems of shared governance in K12 schools.   7) Teacher Unions should encourage building level control over working conditions.   8) Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.   9) Teacher Unions should work with school boards and administrators to identify common goals, beliefs, and values.   10) Identification of common goals, beliefs, and values should be the starting point for bargaining with school districts.   11) Teachers win when teacher unions adopt militant strategies.   12) Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.   13) Teacher bargaining agreements should respond to the needs of districts.

Peer Review

Subtest Two asked 12 questions directly related to peer review programs.

Again, the questions were taken directly from the studies explored in the literature

review – such as question two, "Building performance evaluations should be

completed only by building principals." This item came directly from the themes

explored in the Goldstein and Noguera (2006) article. (The features associated with

peer review are also fairly straightforward and easy to describe and can be found in

Chapter Two.)

The 12 items that were developed were reviewed by two experts in the field

(one a scholar and the other a policy practitioner) and were piloted with a small

convenience sample of 17 practicing educators. Changes were made to the items to

create clarity or eliminate awkward wording. The final 12 items are included below in

Table 3.2.

Table 3.3. *Final Items for Peer Review Subtest.*

1) The Union should take a more active role in the quality control of teachers. 2) Teacher performance evaluations should be completed only by a building principal. 3) Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth. 4) Peer review would solve problems with low performing teachers. 5) Peer review is appropriate for professional development. 6) Peer review is not appropriate for determinations related to contract renewal. 7) My classroom teaching strategies, methods, and organization are not the concern of my peers. 8) Teachers should be responsible for quality control of their peers. 9) Peer review has excellent potential for enhancing education. 10) Peer review programs may leave individual teachers feeling isolated or alienated. 11) New teachers need an induction program that includes a peer review component (e.g., mentoring). 12) Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.

Demographic Information

Following the study disclosure, informed consent section, and subtests,

demographic information was solicited from the respondents. The purpose of

obtaining demographic information is to provide possible sub-group analysis. It was

highly possible that different sub-groups being surveyed had different opinions or

attitudes related to the constructs being studied. Additionally, it allowed the

researcher to compare and contrast the obtained information against certain variables

that are known about the population frame of teachers in Oregon. This assisted with

making determinations related to the generalizability of the data.

As indicated above, there are several demographic factors which may influence data outcomes. (see Table 3.4) A discussion of these is warranted and follows.

Table 3.4. *Demographic Variables Controlled for in the Present Study.*

Demographic Factors
- Number of years teaching
- Building Level
- Age of respondent
- Gender
- Ethnicity
- Title-One school system experience (or experience in at-risk school systems)
- Geographic locale *(Portland metro, the coast, southern Oregon, the Willamette Valley, east of the Cascades)*
- Union Membership

Economic Status & Years of Experience in Education. A teacher's willingness to work on a pay-for-performance plan may be influenced by the number of teaching years and the corresponding step on a traditional salary schedule: the higher the step, the higher the base-wage. Thus, controlling for this demographic feature, in a very general way, by obtaining information related to the number of years working in a certified position, provides a reasonable parameter to help establish whether differences exist, based on years of experience, in the population sampled.

Age of Respondents. A suggestion from the expert review included controlling for age of participants. This was recommended based on the belief that age may contribute towards beliefs related to pay and salary entitlements. Additionally, the issue of teacher-age became a theme in one of the qualitative interviews (see case

study Number Two in Chapter Four). However, there has been no documented literature related to teacher-age and post-industrial labor strategies.

Participant Gender. There is strong evidence that the field of teaching is a feminized profession (e.g., Cortina & San Ramon, 2006). There may be differences in the way gender influences perspectives related to labor reforms. With that said, there are no studies that demonstrate gender preference for various kinds of labor reforms. Ideally, this study attempts to contribute to the knowledge-base as to whether or not gender influences labor preferences in public school settings in Oregon.

Participant Ethnicity. The topic of ethnic status is important to address. According to the Oregon Department of Education, less than five percent of practicing educators in the State of Oregon are ethnic minorities (for a complete breakdown on ethnicity in Oregon see Appendix F). Essentially, Oregon schools have an underrepresented minority presence (Minority Teacher Report, 1997).

It is highly possible that ethnic educators in Oregon have different perspectives and views outside of the Euro-American norm that is dominant in the state. Adopting a critical perspective, the Union could be described as an institution that is designed to serve the needs of its primary constituents: White, middle class educators who represent nearly 96 percent of the teaching population in Oregon. This study assists in understanding the role of ethnicity on preferences for labor reforms.

Work Experience in At-risk School Systems. It is theorized by this researcher that teachers with experiences in at-risk school systems (such as Title-One schools) may be less willing to adopt certain kinds of labor reforms, such as pay-for-performance. In the seminal Koppich (2005) study, the pay-for-performance plan was implemented in Denver, Colorado, possibly in a school that was not at risk for academic failure. Thus, capturing this important demographic variable for analysis is warranted.

Instrument Conclusion

At the end of the survey, respondents were thanked for their participation and asked if they would like to be contacted for a follow-up interview. Participants were assured their responses were confidential and no identifying information or responses were aggregated with contact information.

Issues of Validity and Reliability

With a description of the instrument in hand, the discussion turns to issues of validity and reliability. There were two central questions that had to be answered to ensure validity and reliability:

(a) Is this instrument really measuring teacher attitudes, opinions, and possible behaviors related to labor reforms?

(b) Is the instrument consistently obtaining desired results?

Until the results of the statistical analysis were finalized, no definitive proof could be offered as to whether the instrument was valid. However, an argument for validity and reliability follows.

First, a consideration of the *face* validity of the instrument was made. Face validity refers to whether or not an instrument looks like it is measuring what it is supposed to be measuring. Because the questions on the survey were directly taken from practices in the field, a strong argument for face validity could be made.

Second, an expert review panel reviewed the instrument. A discussion of this review is described in the next section. This review helped ensure *content validity* which largely refers to whether the content of the survey is appropriate for the research objectives.

Third, a consideration of the *construct* validity of the instrument was made. The central tenant of this research is that there are three labor reform constructs that have been widely associated with post-industrial labor reform movements in school systems. The constructs are well documented in the literature: it is well known that there are three constructs directly related to labor reforms and these constructs exist and occur outside of this research report. Fortunately, the constructs are not in a social science laboratory; they are real, observable features of labor reform efforts. In order to assess construct validity, a factor analysis technique was utilized (see Chapter Four).

Fourth, issues associated with external validity were considered. External validity is concerned with whether the testing results are representative of the population – external validity is directly linked to generalizability. A systematic,

randomized method was utilized which allowed generalizations to the population to be made. Thus, there were limited threats to external validity as a result of probability sampling from a known, well-defined population frame (Gall, Gall, & Borg, 2007; Goodwin, 2005; Rea & Parker, 2005).

Methods from Gall, Gall, and Borg (2007) were utilized to assure statistical validity (see Chapter Four). In particular, statistical analysis was employed to point towards the validity of the instrument, in addition to expert review and a pilot.

Expert Review & Pilot Study Prior to Sampling

In an effort to work out item deficiencies before entering the pilot study of this instrument, two experts reviewed the instrument to ensure content validity. Largely, the panel of experts helped determine whether the questions represented the issues that were being explored.

The first expert reviewer was from the Oregon School Boards Association and has nearly 20 years of experience working with school districts on bargaining, salaries, and teacher evaluations across the State of Oregon. The second expert reviewer is well known in academic circles as an expert on teacher Union reforms and has published extensively in this area.

A pilot study was employed prior to conducting a large scale sampling. The purpose of the pilot study was to work through any errors in the administration of the tool. Further, pilot studies lend themselves to research projects that are making a claim of valid, reliable results.

Specifically, a pilot study addresses three key areas with regard to participants and their interactions with a survey. First, a pilot study allows a researcher to determine whether instrument clarity existed: Were the questions worded correctly? Was there any confusion from the participants in regard to what the questions were asking? Were the response choices clear enough to gain desired information? Second, a pilot study addresses: Was the questionnaire sufficiently comprehensive to cover a range of possible outcomes? Finally, a pilot study determines. The participants felt that the questions were not excessive, lengthy, or personally invasive. (Minor word changes were made and a few items were deleted from the pilot study based on the information provided from the expert review.)

Based on the sampling recommendations of Rea and Parker (2005), the pilot included 17 participants from a convenience sampling of educators in the State of Oregon. The purpose of such a small number was not to gain information about the research questions, per se; rather, the purpose of such a pilot study was to determine whether the instrument itself would be successful. It is important to note that the pilot study data were not included in the random sampling data. As such, a practice presents a threat to the validity of the finalized data. The response from the pilot study indicated that the tool was ready to be launched (Rea & Parker, 2005).

Sampling Design

The design for this study considered several factors related to survey development. This data collection followed systematic, randomized protocols to ensure probability sampling of teachers in the State of Oregon. The goal of this sampling was to ensure that the majority of educators in the state of Oregon had the opportunity to hear about the study and make an informed decision to participate. Fortunately, there is an available, well-defined population frame from which to systematically solicit participation.

In all cases of sampling, the known population frame drives the sampling procedure (Gall, Gall, & Borg, 2007; Rea & Parker, 2005). This study is no different, and one method was utilized to ensure the largest chance of participation of all educators in the State, versus other less reliable methods of obtaining survey data.

In the spring of 2008, a blanket email was sent from the Teacher Standards and Practices (TSPC) listserv database. The TSPC list of email addresses of Oregon educators is the most exhaustive and comprehensive list of educators available to any researcher. This list was designed as a means for the Oregon Teachers Standards and Practices Commission to keep a working email address of every educator in the State of Oregon. On this list are 10,000 email addresses of Oregon educators. This list is maintained by the TSPC office and is available to researchers for $20.00. A link to the survey in HTML format was posted within this blanket email. When compared to the ODE statistics related to working educators in the State, approximately one out of every three teachers was on the listserv (see Appendix F). Thus, the probability

sampling could conclude that approximately one out of every three teachers had the opportunity to participate in this study by first-hand invitation. If a teacher forwarded the link, as was allowed, other educators were also included

Sampling Procedures

There are several other kinds of sampling designs that could be considered with this particular study. Readers may wonder why a stratified design was not employed to account for potential differences in means between elementary school, middle school, or high school teachers. Or, readers may wonder why strata were not developed based on teacher demographics, such as minority status, gender, Title-One teaching assignments, etc. Moreover, readers may question why a cluster sampling was not obtained from various subgroups. These questions warrant further explanation to understand the selected design. By looking at the general design feature of both randomized cluster designs and randomized stratifications, they can be ruled out as the best method for the research questions.

First, consider randomized cluster designs. These are only appropriate when the population frame is difficult or cumbersome to conceptualize. If this study were looking at Oregon residents' perspectives of labor reforms, then a cluster sample design would be appropriate. However, the population frame is not cumbersome: the number of teachers working in Oregon is known, as are the exact locations of all teachers. Additionally, the population is considered small. Thus, a cluster sampling can be ruled out since a systematic sampling can be employed.

Second, consider the issues with stratification designs. Stratified designs exist when there are mutually exclusive subgroups that can be reasonably assumed to have considerable differences in means. While there may be differences in means based on certain demographic features of teachers, there is no reason to stratify the design when demographic features of respondents can be compared separately by obtaining demographic information from participants.

Notably, the population frames for many likely strata are confounded by non-systematic school designs. A clear example of this is the fact that it is impossible to guarantee random selection of participants based on school level without excluding several kinds of school systems from the design. In the State of Oregon, there are several K12 schools, alternative programs, and charter schools that do not follow the standardized student grade groupings. Thus, how many teachers are actually working in any given school level would be a grossly imprecise estimate which could lead to sampling frame bias, unless those school systems were dropped from the study. However, based on data from the Oregon Department of Education, there are at least several thousand teachers in these kinds of non-standard school systems. Excluding that much of the population frame could present serious threats to the credibility of this study.

Survey Logistics

The survey itself was housed in an HTML format through an internet based survey provider. It should be pointed out that internet surveys are becoming a popular

method of data collection across the country with the advent of internet technology such as Surveymonkey© Questionmark© and other internet survey providers.

The internet version of the survey was piloted with a convenience sample of 17 educators across the State who made suggestions about wording, format, and accessibility. For instance, one member of the pilot group suggested a different font-size for issues related to readability. Another suggested wording changes to a particular question. In all, the entire results of the pilot were considered, and necessary revisions were made to the final survey.

After the IRB approval, expert review, and piloting, the first email invitation was sent via the TSPC listserv. Approximately one week later a reminder was sent on the same listserv. This generated nearly 800 completed surveys from across the State of Oregon. From the 10,000 invitations there were also 20 interested individuals who contacted the researcher to inquire about the survey, its purpose, and the intended use of the data.

A Discussion of the Mixed Methods Approach

Due to the fact that this study also collected a small amount of qualitative data, a discussion of the mixed-methods approach is warranted. Follow-up qualitative data collection, after initial quantitative data collection, is becoming a popular method for researchers who conduct survey research (Rea & Parker, 2005). Moreover there is a scholarly paradigm for this research method based on the works of Onwuegbuzie (2000). Onwuegbuzie has argued that the lines between strictly quantitative and

qualitative designs are becoming less distinct with mixed research epistemologies. This sentiment has also been recently echoed by Denzin and Lincoln (2003). As such, the interviews, which produced a series of case studies, provided another dimension to the research that is less restrictive than close-ended survey questions. This mixed approach towards educational research has recently been explored by Pole (2007).

The rationale for the present mixed methods technique comes from Pole (2007) who provided a summary of the major issues in educational research based on several leading research theorists (e.g., Creswell, Plano-Clark, Guttman & Hanson, etc.). This summary provided a framework for conceptualizing the issues related to mixed methods designs on the both the philosophical and practical levels.

Essentially, Pole (2007) has proposed that there are three ways in which an educational researcher adopts a mixed-methods perspective towards research. The first perspective is considered a pragmatic orientation, the second perspective is considered a transformative-emancipatory orientation, and the third perspective is considered a multiple-paradigm orientation. Generally, according to Pole, an educational researcher utilizing mixed-methods fits into one category or the other. It is important to note that the first two methods are categorized by belief systems, while the third is characterized by research process and a thorough reflection on the research question.

In the first perspective, pragmatism, mixed methods researchers reject the idea of ontological and epistemological issues related to truth. Essentially, these educational researchers are interested in conducting what could be considered functionalist research in education. Thus, pragmatist researchers are interested in

conducting research that answers the question: what works in a school system? The

aim of this form of research is generally to answer specific questions that solve

problems in school systems on issues related to teaching and learning. Out of

necessity to solve problems, researchers employ multiple methods in some form of

inquiry. With problem-solving as the objective, ontological or epistemological

perspectives take a "back-seat" (Pole, 2007).

The second mixed-method orientation, transformative-emancipatory research,

is deeply concerned with understanding social problems within educational settings.

This form of mixed-methods research holds that there are multiple realities that define

and explain the social universe; however, those realities can often be grounded in

some form of "social, historical, or economic" context (Pole, 2007). Thus, there are

components to social reality which are interpretive in nature; and there are

components to social reality that are quantitative in nature. Understanding the

complex relationship between the two is a central objective of this kind of research for

the express purpose of improving social circumstances within public education

agencies (Pole, 2007).

Finally, there is a third form of mixed methods research, the multiple-paradigm

position. In this form of mixed methods research, the question that is being asked

drives the form of inquiry. Specifically, the multiple paradigm position assumes one

of four scenarios based on simultaneous-sequential sampling and data-collection to

answer a particular research question that warrants utilization of both methods. This

form of research encourages the researcher to consider the nature of the question in

order to shape and inform the research process with regard to the kind of data collected (Pole, 2007). This study could be considered a multiple paradigm study.

Within this mixed paradigm, there are four possible scenarios for conducting data collection. A discussion of each is warranted as the present study has adopted one of the forms of inquiry. First, qualitative research may be initially conducted for the purposes of ultimately developing measurements, constructs, instruments, etc. In this way, the qualitative data collection drives the quantitative methods in a formative process. Second, quantitative data may be collected to help interpret a set of qualitative data. In this way, a large set of qualitative data may exist; however, it may be cumbersome or difficult to interpret without some reduction method. As such, a quantitative follow-up may be warranted.

Third, quantitative research may be conducted with follow up qualitative inquiries to help interpret the quantitative data set and the conducted analysis. This is particularly useful where deeper discussions of the issues are needed, especially across sub-groups of participants within a larger sample. The benefit of this kind of research is a richer understanding of the collected data and the possibility of interpreting the "why."

Fourth, both quantitative and qualitative data may be collected in a simultaneous or parallel manner. In this form of mixed methods research, both methods of data collection are employed at the same time and are interpreted in light of one another. They both function as equals in the research process. One does not drive the other; rather, they both influence each other during the interpretation stage of research.

The fourth form of inquiry was used in the present study. Essentially, this inquiry allowed the researcher to consider individuals and their personal beliefs within the context of a measured population frame. Yet, the entire analysis was not complete when the qualitative inquiry began. The qualitative inquiry only came after the quantitative data as a matter of logistics, not specific research design. This form of inquiry provided richer descriptions of the measured variables from the inner perspective of the research-participants. It allowed the research participants to help frame the data outcomes through a case approach. Moreover, this method allows researchers to link themes between the qualitative and quantitative data-sets. It is important to point out that the quantitative analysis did not drive the qualitative questions. In this study, the qualitative questions were developed in a parallel fashion to the quantitative questions.

Notably, the assumptions of all three kinds of mixed methods orientations have one particular commonality: the need to move beyond the "paradigm wars." As Pole (2007) has noted, the driving force behind all of these methodological approaches is the need to find solutions within school systems, not necessarily the need to find the absolute truth related to an epistemological perspective. Rather, the conflict and dialogue that occurs from mixing the designs has incredible value in educational research. Both have much to learn from each other.

Logistics of the Qualitative Data

The interviewees consisted of four practicing educators who identified themselves as willing to participate in follow-up interviews following the quantitative survey launch. There were no particular selection procedures for qualitative participants other than the requirement of being a licensed educator in Oregon and participants were required to be currently working in a school system. Ideally, a large enough group of educators would have been interested in participating in the qualitative interviews to generate several focus groups. In the original design, focus groups were to be used. However, the number of participants severely limited that goal. As a condition of participating, the interview participants were asked to provide informed consent.

While Rea and Parker (2005) have provided general strategies and suggestions for interview techniques, the methods can be enhanced by looking to the recommendations of Gall, Gall, and Borg (2007). Essentially, Gall, Gall, and Borg provided a series of guidelines for interview procedures. In this case, a semi-structured interview procedure was utilized with the participants. The semi-structured interview method allowed for individual participants to respond to specific questions and subsequently provided further information based on probing questions from the interviewer. The goal of the interviews was to develop a richer understanding of the constructs being measured on the survey. Importantly, these interviews were

completed independently of the quantitative analysis. The measurement component of the present study had not been finalized when the interviews were conducted.

The interviewer digitally recorded the interviews and analyzed the responses for general themes related to opinions, attitudes, and beliefs after the digital recording was transcribed. The researcher also utilized field notes to assist in the data collection. Following the transcription into the data collection tool, the digital recording was destroyed, consistent with the approved Institutional Review Board protocol. The results of the follow-up interviews are reported as case studies based on the individual's response to the guiding questions and the subsequent conversations. The following questions were adopted as the guiding questions for the semi-structured interviews (see Table 3.5). Moreover, these questions turned into the qualitative data collection tool.

It should be noted that the semi-structured interview questions were piloted with the first interviewee, who had extensive interest with the constructs being researched. This interviewee was able to give specific feedback on the questions and help the researcher understand how to frame the interview questions to the other interviewees.

All qualitative participants had the opportunity to review the responses that were recorded (in the transcription, based on the qualitative data collection tool) and approve the comments that were captured in the case-study. Moreover, participants were given opportunities to refine their responses in writing, after the researcher was finished with the interview. This allowed the researcher to follow a systematic method of clarifying participant beliefs' related to the labor reforms. This allowed the

researcher to capitalize on qualitative methods of inquiry that utilize participant

convergence and, to a limited extent, consensus building.

Table 3.5. *Semi-Structured Interview Questions & Data Collection Tool.*

Demographics (same as survey)

1. Can you explain your personal beliefs related to teacher Unionization? What specific experiences have led you to your conclusions?
2. Does teacher Unionization support teachers or students? Or, both?
3. Do you think Union reforms are necessary? If so, what kinds of reforms.
4. What should be the goals of a teachers' Union?
5. Please explain your thoughts on *peer review* programs in K12 systems.
6. Please explain specific impacts (negative or positive) that peer review may have on the K12 system in Oregon.
7. Are you likely to support such a program? Are you likely to oppose such a program? What factors would make you support or oppose such reforms?
8. Please explain your thoughts on *alternative pay programs* in K12 systems.
9. Please explain specific impacts (negative or positive) that alternative pay plans may have on the K12 system in Oregon.
10. Are you likely to support such a program? Are you likely to oppose such a program? What factors would make you support or oppose such reforms?
11. Please explain your thoughts on *collaborative versus non-collaborative* bargaining strategies in K12 systems.
12. Please explain specific impacts (negative or positive) that collaborative bargaining may have on the K12 system in Oregon.
13. Are you likely to support such a program? Are you likely to oppose such a program? What factors would make you support or oppose such reforms?
14. Can you think of any other Union reforms that may impact school functioning in a positive way?
15. Have these examples occurred in the State of Oregon?

Design Limitations

There are always concerns and issues in any research design. In particular,

survey designs are generally thought to have weaknesses. A discussion of those

limitations is warranted with regard to this study.

Essentially, survey research limits participant responses to pre-defined answers as determined by the researcher. This research is no different in the sense that the researcher has pre-determined answers that are thought to represent the parameters related to the identified constructs. Two methods were employed in an effort to control for this research dynamic: (a) follow up interviews, which allowed for interested participants to provide further in-depth responses; and (2) pilot-testing, where comparable participants were able to provide feedback and help refine the survey questions.

Institutional Review Board Approval

This study obtained the necessary IRB approval from Oregon State University to conduct a large sampling of educator beliefs related to labor reforms. The IRB application was approved with only minor changes to the original application. Because the follow-up interviews were not anonymous, the researcher obtained informed consent consistent with IRB guidelines. A full review was not required because the risk level was considered low to participants.

All participants were required to give informed consent via written signature for the follow-up interviews. The interviews were audio-taped. However, those audio-tapes were destroyed after the cases were written. A copy of the IRB approval is enclosed in Appendix E.

Conclusions

The methods used in this study generated a large amount of quantitative data related to educator perceptions of post-industrial labor reforms and labor changes utilizing random sampling strategies. A survey instrument was developed, expert-reviewed, and pilot-tested prior to being launched in the Spring of 2008 across the state of Oregon. The survey contained several items related to teacher beliefs of Union reforms and had controls for demographics. Utilizing readily-available online survey technology, the researcher was able to sample educators across the entire State through access to the Teachers Standards and Practices listserv – which is the largest available listserv available to any researcher studying Oregon educators.

Over 10,000 educators were asked to complete a survey related to educator beliefs of labor reforms through an online sampling procedure. Nearly 800 teachers across the State completed the survey generating the largest independent data-set of educator beliefs related to labor reforms in the country. The results were then matched to the known Oregon educator demographics from 2005-2006.

Additionally, four individual teachers were interviewed to analyze individual perspectives related to labor reforms. These individuals were interviewed for nearly an hour each and agreed to read the research cases that were generated from the interviews. They then made comments on the cases and provided validation that the generated case studies matched their perspectives and beliefs. This form of note-

checking is utilized in many social science disciplines and is appropriate for

educational research as a form of member checking (Gall, Gall, & Borg, 2007). This

generated a small amount of qualitative data to help interpret the results of the larger

data set. This data collection effort led to a body of empirical evidence related to

Oregon educators beliefs about post-industrial labor reforms.

The study presents significance on several levels, as discussed in Chapter One.

Further, issues related to teacher Unionism were thoroughly explored in Chapter Two,

including the contextual issues related to studying teacher Unions in the State of

Oregon. The present chapter described the methods to answer the guiding research

questions. Chapter Four provides the data findings. In particular, Chapter Four

presents the statistical analysis of the data set. Additionally, it presents the interpretive

case-studies. Chapter Five provides an interpretation of the findings and conclusions.

CHAPTER FOUR

RESULTS

The purpose of this chapter is to provide readers with a broad understanding of the data outcomes. Additionally, this chapter provides readers with the case studies that were generated from the qualitative data collection. It should be pointed out that all decimal places in the analysis were rounded to the nearest one-hundred, except where noted. Decimals were rounded to keep a consistent use of significant figures.

PART ONE: Quantitative Results: Response Rates

Teachers Standards and Practices Commission (TSPC) would not release the database of all working email addresses of teachers due to the fact that several teachers only report their home emails on their license applications. To protect their confidentiality, TSPC has safeguarded those email addresses. Thus, only 9,965 educators were solicited for participation. This represents 31% of the entire population based on a teaching work-force of nearly 32,000 (see Chapter Three).

These nearly 10,000 educators received an email that contained information on how to complete the quantitative questionnaire with a link to an HTML website. Once the website was accessed, respondents completed an online survey tool which captured their responses in real-time and uploaded the numeric data to a database. From this database, the researcher accessed the file in a format that was transported into an SPSS document. SPSS 15.0 was used to analyze the survey results.

Of these 9,965 invitations there were 891 logins to look at the survey. A total of 819 participants gave informed consent to complete the survey after logging into the server. Of the 891 total survey log-ins, 771 were survey completers. Of the 779, 49 individuals who gave informed consent ceased participation after some time. The drop-out rate was calculated at approximately six percent. Several study participants were interested in sending the link to their co-workers or colleagues, and this was allowable through the attachment of a generic link to the survey on the second reminder for completion. Thirteen survey completers responded by invitation from a colleague.

It should be noted that there were several emails that were returned from the online email management system. The TSPC database is not an exact method of contact for Oregon educators. While it is currently the best method available, it is still an "approximate" way to reach the teaching population within the State. The return-mail transcripts were randomly analyzed to assure that return mails were not coming from a singular district or regional server. There were 2,000 emails that were returned with both the initial sampling and follow-up sampling. Largely, the returned email addresses were undeliverable due to the user no longer being employed with the school district. The second leading cause of a returned mail was the use of an expired University email account. Many new educators had listed a university email account as a means of communication with TSPC and then had not updated the account after beginning employment to reflect their current district email.

Sample Size Calculator

The sample size calculator (Sample Size Calculator, 2007) provides a tool for calculating the needed sample size to create parameter estimates of reliability. This tool confirms the confidence level and confidence intervals needed to assist with making claims of generalizable research results - partially speaking to the reliability of the collected data.

A sample size of 652 respondents was the minimum amount needed to generate a confidence interval of five percent with a confidence level of 99% (considering a population of approximately 30,000.) These confidence parameters were exceeded on every subtest item. The confidence level on the demographic item was reduced to a 95% level (some individuals did not complete the demographic items). Both levels met the requirements for social science and educational research as reported by Gall, Gall and Borg (2007).

Demographic Indicators of Representation

When compared with the Oregon Department of Education demographic statistics, the sample of educators for this study is fairly representative (see Appendix F). The sample was largely from the population of Oregon Educators, based on the available demographic data related to teacher gender and ethnicity. The average number of years employed in the K-12 system is not available by teacher; unfortunately, it is only available by school. Thus, the two key indicators of representation are gender and ethnicity. While the ethnicity statistic does not

necessarily match on the category of White-Caucasian, respondents in the present

study had the option of skipping or not-disclosing an answer. Interestingly, the

percentage who skipped the question or refused to disclose the answer accounts for the

remaining percentage in the category of White-Caucasian. Thus, it is highly likely

that many White-Caucasian educators skipped the question or chose not to disclose an

ethnic category, especially considering that Oregon is primarily composed of white

educators.

Table 4.1. *Comparison of Sample Demographics to State Demographics.*

Indicator	Sampled Educators in Present Study	100% of State Educators as compared to 2005-2006 ODE demographics
% of Women	64.2%	66%
% of Men	35.8%	34%
% of African American Respondents	.3%	.8%
% of Hispanic or Latino Respondents	3%	2%
% of Asian/Pacific Islanders Respondents	1.6%	1.5%
% of Native American Respondents	.8%	.3%
% of Individuals Identifying as Other	2.6%	Unknown
% of Caucasians of European Descent	81.9%	93%
Average number of years teaching	12.3 years *(715 responses)*	Unknown

Item Level Responses

Both Appendix A and Appendix B provide a complete break-down of the results by item and also list the demographic breakdowns. The following sections highlight the analytical portion of the present research.

Cronbach's Alpha

Cronbach's alpha is a useful test for assessing the reliability of an instrument; and has become a hallmark test in analytical models that rely on scaled reliability analysis procedures. The Cronbach's alpha score was at a .692, representing the entire structure of the instrument approaching a level of reliability and consistency. The reliability analysis was based on all 36 items in the instrument. Poor performing items were not removed to obtain this score, which indicates the survey approached a level of acceptability. It should be noted that, based on the instrument sub-scales, a series of nine other Cronbach's alpha scores are reported later.

Factor Analysis

Factor analysis is one of the most useful techniques a quantitative researcher can utilize for reducing large amounts of data to latent constructs. Latent constructs can be thought of as the larger, measurable variables that are represented by several items or a group of items. Factor analysis is one of the foundational tools in

measurement validation. Throughout this research project the entire instrument was subjected to a data reduction procedure to understand what latent traits were being measured – and how individual items, when patterned with each other, could predict latent traits. A discussion of the analytical procedures and results follows.

There are multiple points of decision in the utilization of factor analysis as a data reduction tool. Particularly, there are three key questions, or points of action, that must be answered and explored to move forward with an analysis of any factor structure: (a) what kind of factor model will be employed with the items (exploratory or confirmatory); (b) what kind of extraction method will be employed with the items; and (c) what kind of rotation will be utilized with obtained factor solutions? Each question poses a set of possible complications and nuances within the data interpretations.

An exploratory model was selected to analyze the data patterns. This is appropriate for understanding how variables on a test may interact with each other and other items across the entire instrument. Moreover, this is useful for determining whether certain items on a subtest can explain the variance on another subtest. It allows the researcher to rule out (or confirm) patterns of cross-loadings and points to whether or not a researcher has captured the discreteness of the latent variables on a particular subtest. This is important for the present study as it could confirm that participants were able to make the distinction between three kinds of specific labor reforms instead of simply seeing the opportunity to express opinion for change and respond to such in an acquiescent fashion. Based on the exploratory model, we can confirm that nine patterns of question groupings emerged across the data set.

As a technical point, this exploratory model utilized what is known as a Varimax rotation, which was selected based on the probability of producing the simplest factor structure possible with the available data set. This method of rotation is considered to be orthogonal and reduced the number of factor loadings on each factor. This method is useful for determining which items actually differentiate onto one factor and not onto another factor. Additionally, this form of factor analysis does not allow for correlations between the obtained factors which assisted in minimizing cross loadings. The obtained factor structure also utilized a maximum likelihood model of extraction. This method considered parameter estimates of the latent variables being measured and utilized an extraction method based on the normally distributed population of responses. For a breakdown of the results, see Appendix C.

The following Scree-plot and variance-explained table illustrate that there are nine factor solutions that could be utilized in the solution. The first nine identified factors explain approximately 55 percent of the variance with an eigenvalue over 1.0. At the 10th factor, the eigenvalue drops to less than one, which suggests that the rest of the factors are not solid.

Figure 4.1. *Scree-plot of the Factor Analysis.*

Scree Plot
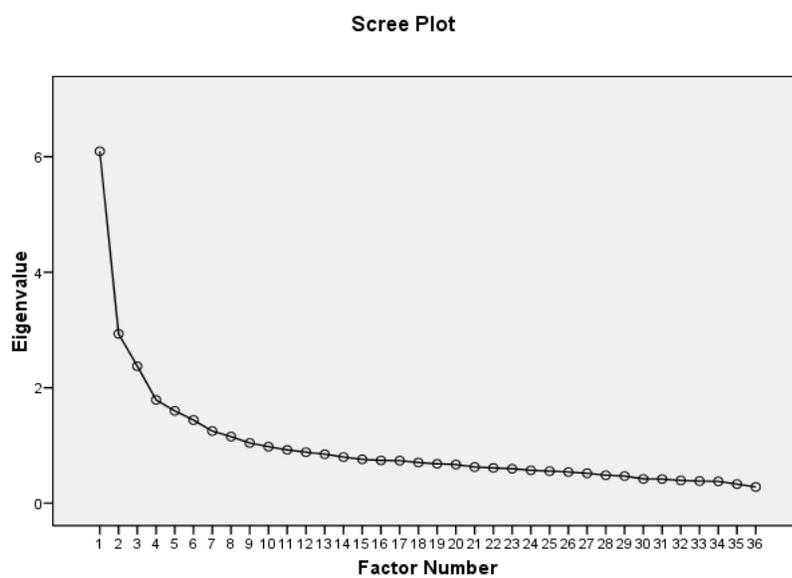
Table 4.2. *Total Variance Explained.*

Factor	Initial Eigenvalues			Rotation Sums of Squared Loadings		
	Total	% of Variance	Cumulative %	Total	% of Variance	Cumulative %
1	6.094	16.929	16.929	2.611	7.254	7.254
2	2.933	8.148	25.076	2.462	6.840	14.094
3	2.372	6.589	31.665	1.819	5.054	19.148
4	1.789	4.970	36.635	1.677	4.657	23.805
5	1.600	4.444	41.079	1.634	4.540	28.345
6	1.441	4.002	45.081	1.397	3.881	32.226
7	1.250	3.473	48.553	1.345	3.736	35.962
8	1.154	3.205	51.758	.782	2.173	38.135
9	1.044	2.900	54.658	.635	1.763	39.899
10	.979	2.720	57.378			
11	.924	2.565	59.944			
12	.884	2.456	62.400			
13	.849	2.359	64.759			
14	.800	2.222	66.981			
15	.760	2.110	69.091			
16	.742	2.060	71.151			
17	.737	2.047	73.197			
18	.705	1.957	75.155			
19	.684	1.900	77.055			
20	.670	1.860	78.915			
21	.627	1.741	80.656			
22	.611	1.699	82.355			
23	.598	1.662	84.017			
24	.570	1.584	85.601			
25	.556	1.545	87.145			
26	.541	1.502	88.648			
27	.519	1.442	90.089			
28	.485	1.347	91.437			
29	.471	1.308	92.745			
30	.422	1.171	93.916			
31	.419	1.165	95.081			
32	.395	1.098	96.178			
33	.384	1.067	97.245			
34	.378	1.051	98.297			
35	.332	.921	99.218			
36	.282	.782	100.000			

Note: This table is the direct SPSS output from the above analysis. Thus, decimals are rounded to the nearest thousands place.

It is very important to interpret the Scree-plot and the variance-explained chart in the light of the goodness of fit data. The statistic below, related to goodness of fit, suggests that the factor analysis is not a useful tool for understanding the measured constructs ($p < 0.05$). Or, put another way, the data does not match the factor reduction technique. Simply put, the factor analysis model only explains 55 percent of the variance in the data-set with a nine factor solution without rotation. Once rotated, the total variance explained by the nine factors is less than 39 percent. Thus, based on the goodness of fit model, the data produced from the factor analysis procedure is not useful for any other interpretation.

Table 4.3. *Goodness-of-fit Test Based on Chi-Square.*

Chi-Square	Degrees of Freedom	p. value
398.49	342	.02

Note: Decimals rounded to the nearest 100's place.

Hierarchical Cluster Analysis

Revelle (1979) pioneered the use of Hierarchical Cluster Analysis (HCA) as a means of item testing. This method of item classification has become paramount to the field of psychometrics and is considered one of the foundational exploratory models in test development. Essentially, this form of data analysis allows a survey researcher to understand how items interact with one another when collected data does not meet the statistical requirements for factor analysis (as noted above). This form of analysis removes the parametric requirements for factor analytic techniques. It assumes that variables (items on a scale) are objective rankings versus points on a

continuum. Thus, one can think of the response as more of a category (e.g., strongly disagree vs. strongly agree) rather than a continuous point. Since this form of HCA links items based on their interaction with one another, it is also referred to as a nearest neighbor analysis. (For a further discussion of cluster analysis, agglomeration schedules, and their interpretation see the works of Garson (2008)).

HCA allows items to be grouped into their clusters, and allows for the interaction of those clusters to be understood. The dendograms below provide a detailed look at the interaction of items. Additionally, the cluster solutions are displayed in the agglomeration schedule. The distance between the clusters can be interpreted by noting whether the survey item is close to another survey item in the rescaled distance cluster combine. An annotated figure is provided in the first dendogram interpretation to assist readers.

Subtest #1: Alternative Pay in the Hierarchical Cluster Analysis Model

The agglomeration schedule in Table 4.4 provides the solution for the HCA analysis that is graphically represented in the dendogram in Figure 4.2. Large "jumps" in the integers of the coefficient category indicate a solution of clusters. For example, from stage 9-10, the coefficient jumps from 3356.143 to 7079.455. This indicates that a new cluster has been discovered at that particular stage. In this case, items two and six are found to be related to each other.

Agglomeration schedules are difficult and cumbersome to interpret. As such, SPSS 15.0 automatically recodes the Agglomeration schedule into a dendogram, and provides the cluster categories, when programmed. A dendogram is a visual tool to

represent how items cluster with one another and what level they cluster with each other. The closer the items, the more closely they are linked (co-occur) with one another. This can be a much more useful tool for understanding how items interact and form relationships, as compared to just looking at the solution as provided by the agglomeration schedule.

Table 4.4. *Agglomeration Schedule for HCA Analysis of Alternative Pay.*

Stage	Cluster Combined		Coefficients	Stage Cluster First Appears		Next Stage
	Cluster 1	Cluster 2	Cluster 1	Cluster 2	Cluster 1	Cluster 2
1	3	5	121.000	0	0	2
2	3	4	301.333	1	0	5
3	10	11	481.833	0	0	4
4	9	10	720.000	0	3	8
5	1	3	1041.667	0	2	10
6	6	7	1406.667	0	0	7
7	6	8	1843.000	6	0	9
8	2	9	2463.333	0	4	9
9	2	6	3356.143	8	7	10
10	1	2	7079.455	5	9	0

Note: This table is the direct SPSS output from the analysis. Thus, decimals are rounded to the nearest thousands place.

Figure 4.2. *Cluster Combination Dendogram for Alternative Pay Grouped by Item Number.*
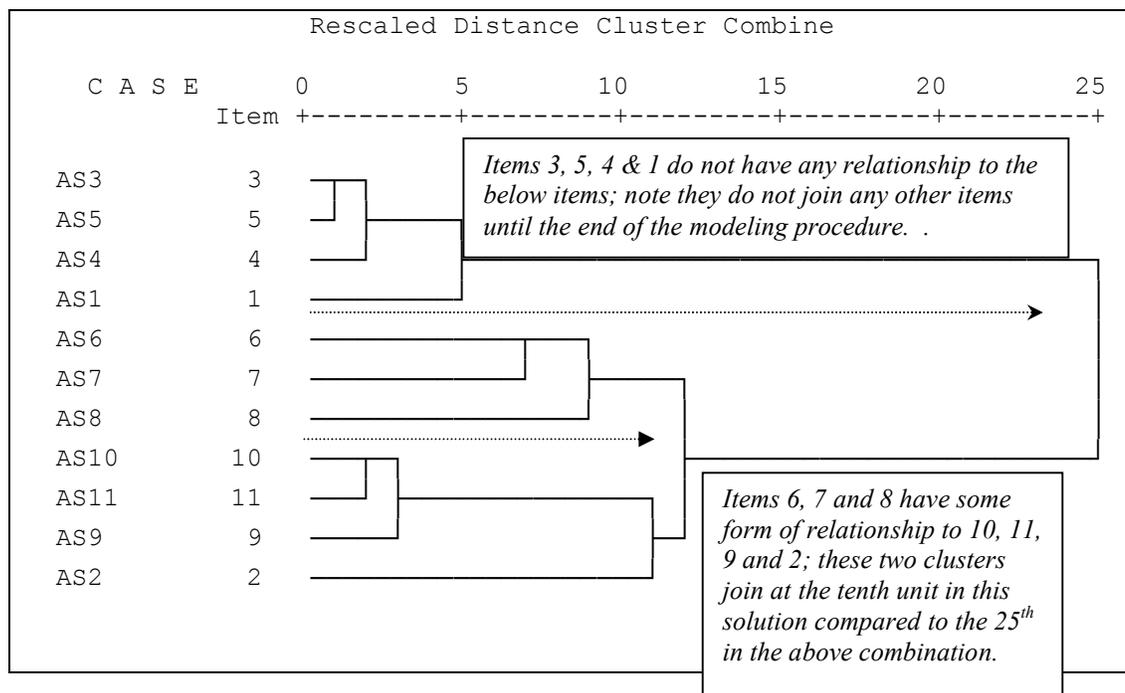
Table 4.5. *Cluster Combinations by Item for Alternative Salary Schedules.*

Cluster #1 *Student performance as a basis for pay*	• Student performance provides objective criteria for pay for performance (3) • I would be comfortable with my salary being tied to student performance (5) • Standardized achievement results are indicators of teacher performance (4) • Educators should be compensated for increases in student performance (1)
Cluster #2 *Teacher performance/ accomplishments as a basis for pay*	• I would be comfortable with my salary being tied to my accomplishments (6) • I would be comfortable with my salary being tied to duties outside of my classroom (7) • Teachers new to the profession should have opportunities to advance the salary schedule at faster rates (8)
Cluster #3 *Teacher performance/ accomplishments as a basis for pay*	• Teachers should have opportunities to increase their earnings by taking on extra duties (10) • Teachers who perform highly in extra duty assignments that benefit the entire school should be compensated for those duties (11) • Teacher education level (graduate courses, certificates, etc…) should be utilized to determine teacher salary level (9) • Traditional salary structures based on years of experience and education are adequate for the teaching profession (2)

The dendogram in Table 4.2 illustrates that three clusters were identified. Each of the three clusters of items has apparent themes. We could broadly say that cluster number one is related to student performance as an objective indicator for teacher pay. Cluster number two is related to teacher pay being linked to indicators of performance, none of which are related to student achievement. Cluster number three is related to teachers earning additional income through forms of compensation not tied to student achievement. These three themes are discussed in Chapter Five.

Subtest #2: Bargaining Strategies in the Hierarchical Cluster Analysis Model

The agglomeration schedule in Table 4.6 provides the solution for the HCA

analysis that is graphically represented in Figure 4.3. Again, large "jumps" in the

integers of the coefficient category indicate a solution of clusters. SPSS 15.0

automatically recodes the Agglomeration schedule into a dendogram and provides the

cluster categories, when programmed. For this subtest, we see that there are two large

cluster solutions, and one of the clusters contains two larger sub-sets of clusters.

Based on the solution in the above dendogram, it is important to note that the cluster

combinations appear as three clusters and are discussed as three clusters,.

Table 4.6. *Agglomeration Schedule of Items Related to Bargaining.*
Agglomeration Schedule of Items Related to Bargaining.

Stage	Cluster Combined		Coefficients	Stage Cluster First Appears		Next Stage
	Cluster 1	Cluster 2	Cluster 1	Cluster 2	Cluster 1	Cluster 2
1	9	10	99.500	0	0	8
2	7	12	294.500	0	0	4
3	1	6	497.500	0	0	5
4	7	13	725.167	2	0	6
5	1	3	954.167	3	0	8
6	4	7	1239.750	0	4	10
7	2	11	1540.750	0	0	12
8	1	9	1849.650	5	1	9
9	1	5	2218.750	8	0	11
10	4	8	2599.300	6	0	11
11	1	4	3361.364	9	10	12
12	1	2	5133.846	11	7	0

Note: This table is the direct SPSS output from the analysis. Thus, decimals
are rounded to the nearest thousands place.

Figure 4.3. *Dendogram of Items Related to Alternative Bargaining Strategies Grouped by Item Number.*

Table 4.7. *Cluster Combinations of Items Related to Alternative Bargaining Strategies*

Cluster #1 *Ideals of collaborative bargaining*	• Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values (9) • Identification of common goals, beliefs and values should be the starting point for bargaining (10) • Teacher Unions should lead the way on educational policy issues (1) • Teacher Unions should be creating and advocating for systems of shared governance in K-12 (6) • Bargaining is a tool to establish sound policy (3) • Teacher Unions' first priorities should be related to teacher needs (5)
Cluster #2 *Collaborative bargaining as a tool*	• Teacher Unions should encourage building level control over working environments (7) • Teacher bargaining agreements should be flexible documents that respond to the needs of buildings (12) • Teacher bargaining agreements should respond to the needs of districts (13) • Teacher Unions' first priorities should be related to learning needs (4) • Teachers Unions have not utilized their collective power to advocate for real issues related to learning needs (8)
Cluster #3 *Items related to militancy and economics*	• Teacher Unions should only bargain for economic necessities (2) • Teachers win when Unions adopt militant strategies (11)

Three clusters are apparent from the HCA analysis above. Cluster number one is related to the ideals associated with collaborative bargaining strategies. Cluster number two is related to the goals of the Union and how the Union should organize, specifically bargaining as a tool for change. Cluster number three is related to economic necessities and militant strategies. Interestingly, items in cluster number three (militancy and economics) did not mediate any other responses related to collaborative strategies (cluster number one) and bargaining as a tool (cluster two).

Subtest #3: Peer Review in the Hierarchical Cluster Analysis Model

The agglomeration schedule in Table 4.8 provides the solution for the HCA

analysis that is graphically represented in the dendogram in Figure 4.4. Again, large

"jumps" in the integers of the coefficient category indicates a solution of clusters.

SPSS 16.0 automatically recodes the Agglomeration schedule into a dendogram and

provides the cluster categories when programmed. For this subtest, we see that there

are two large cluster solutions, with one of the clusters containing two larger sub-sets

of clusters. These clusters are discussed as three separate clusters because the

relationship between the related clusters is distant, as evidenced by the HCA.

Additionally, for all practical purposes, it is important to reduce each of the clusters to

a coherent theme and the correlation between the clusters will be discussed later.

Table 4.8. *Agglomeration Schedule of Items Related to Peer Review.*

Stage	Cluster Combined		Coefficients	Stage Cluster First Appears		Next Stage
	Cluster 1	Cluster 2	Cluster 1	Cluster 2	Cluster 1	Cluster 2
1	5	9	113.000	0	0	3
2	4	8	292.000	0	0	5
3	5	12	499.000	1	0	6
4	2	6	782.500	0	0	7
5	3	4	1074.167	0	2	8
6	5	11	1381.417	3	0	10
7	2	10	1723.917	4	0	9
8	1	3	2094.000	0	5	10
9	2	7	2529.250	7	0	11
10	1	5	3241.000	8	6	11
11	1	2	4584.417	10	9	0

*Note: This table is the direct SPSS output from the analysis. Thus, decimals
are rounded to the nearest thousands place.*

Figure 4.4. *Cluster Combination of Items Related to Peer Review Grouped by Item Number.*

```
                  Rescaled Distance Cluster Combine

     C A S E         0         5        10        15        20        25
              Item +---------+---------+---------+---------+---------+

   P5            5   ┐
   P9            9   ┘
   P12          12
   P11          11
   P4            4
   P8            8
   P3            3
   P1            1
   P2            2
   P6            6
   P10          10
   P7            7
```
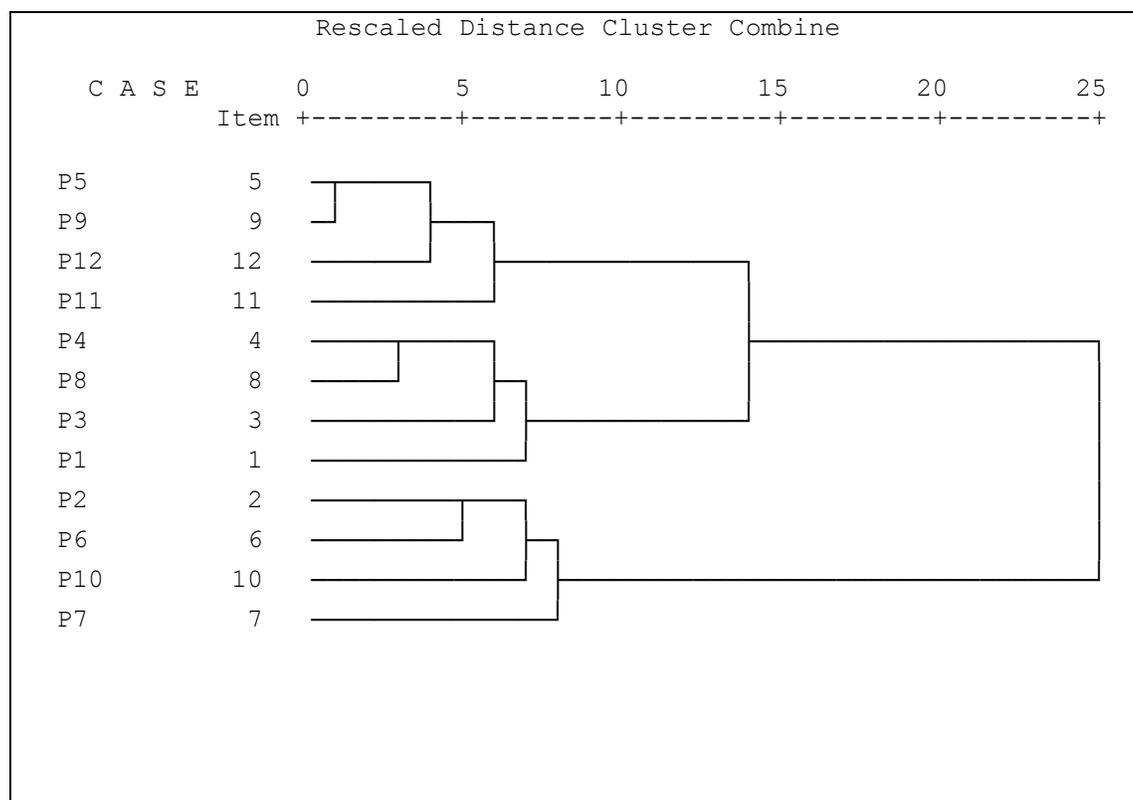
Table 4.9. *Cluster of Items Related to Peer Review.*

Cluster #1 *Peer review and professional development issues*	• Peer review is appropriate for professional development (5) • Peer review has excellent potential for enhancing education (9) • Inadequately performing senior teachers need peer review as a component of a plan of assistance (12) • New teachers need a peer review program (such as mentoring) (11)
Cluster #2 *Potential outcomes of peer review*	• Peer review would solve problems with low-performing teachers (4) • Teachers should be responsible for the quality control of their peers (8) • Having a panel of master teachers and administrators determine who was offered contract renewal would be a powerful tool for growth (3). • The Union should take a more active role in the quality control the teaching profession (1)
Cluster #3 *Industrial oriented items related to peer review*	• Teacher performance evaluations should be completed only by building principals (2) • Peer review is not appropriate for determinations related to contract renewal (6) • Peer review may leave individuals feeling isolated or alienated (10) • My classroom strategies and methods are not the concern of my peers (7).

Cluster number one deals with the purpose of peer review as a professional development tool and, to some extent, the potential of a peer review program (item number 9). Cluster number two deals with who should be conducting peer review - and the benefits of a peer review program. It is also important to note that cluster number one and cluster number two appear to have some relationship. Cluster number three is related to the limitations of peer review and whether peer review is a potentially viable strategy compared to current employee evaluation practices. It is important to note that cluster number three appears to have no relationship to clusters number one and two, suggesting there is a discrete difference between the industrial

oriented items and the benefits of peer review. For the purposes of discussion, we will discuss these clusters as separate from each other. These results will be further discussed in Chapter Five.

Cluster Reliability Analysis

Further, Cronbach's alpha scores are reported for each cluster in Table 4.10. This is a recommendation of Revelle (1979) for utilization of scales based on HCA analysis. It would appear that each of the cluster scales have a range of reliability estimates. It should be pointed out that the ideal coefficient is .70. Only one cluster combination achieved this score, which dealt directly with linking teacher salary to student performance. Thus, the most reliable finding from this survey is probably related to the fact that teachers were not comfortable with their salary being linked to student achievement.

As a whole, the Cronbach's score suggests that the instrument could be more reliable in measuring potential one-dimensional traits. It is important to point out that the survey could be picking up on multiple dimensions of several traits within each subscale. As was noted in the HCA dendograms, there were relationships between several of the clusters, albeit estimated imprecisely. If this is the case, a further form of analysis is warranted related to multi-dimensional scaling. This is discussed in Chapter Five.

With that said, it is important to point out that only one of the subscales is in what could be considered a "critical zone" for a low reliability estimate (alternative

salary cluster number 3). Overall, the instrument could be interpreted as moderately

reliable. Thus, the results are interpreted with caution, especially when considering

the relatively small sample size of approximately 800 respondents.

Table 4.10. *Further Reliability Score Estimates.*

Cluster	N*	Alpha Coefficient
Alternative Salary Cluster 1 *(Standardized Pay)*	755	**.846**
Alternative Salary Cluster 2 *(Salary tied to accomplishments)*	751	**.500**
Alternative Salary Cluster 3 *(Opportunities to increase earnings through non-standardized salary schedules)*	758	**.357**
Bargaining Cluster 1 *(Ideals of Collaborative Bargaining)*	662	**.543**
Bargaining Cluster 2 *(Bargaining as a tool to enhance education)*	663	**.573**
Bargaining Cluster 3 *(Bargaining related to economic necessity)*	702	**NA****
Peer Review Cluster 1 *(peer review and professional development issues)*	682	**.693**
Peer Review Cluster 2 *(Potential benefits of peer review)*	659	**.629**
Peer Review Cluster 3 *(Industrial-oriented items related to peer review)*	672	**.531**

* Where N = the number of respondents in each cluster responding to all items.
**Only two items in this cluster; the coefficient was not computable.

Scaled Cluster Analysis & Findings

Each of the clusters had a unique scale due to the number of items that were

contributing to the scale. Table 4.11 illustrates the descriptive statistics

corresponding to each cluster. Individuals who did not respond to one item within

each cluster were excluded from the analysis at the cluster level. It is interesting to

note that the majority of the clusters were fairly normally distributed. However, there is one exception: teacher salary being linked to standardized measures of student achievement (see cluster number 1 in the alternative salary section). This will be discussed in Chapter Five.

Table 4.11. *Descriptive Statistics of Each Cluster.*

CLUSTER COMBINATION	N	Min	Max	Mean	S.D.
Alternative Salary Cluster 1 *(Student Achievement as a Pay basis)*	755	4.00	16.00	6.70	2.51
Alternative Salary Cluster 2 *(Salary tied to accomplishments)*	751	3.00	12.00	7.96	1.80
Alternative Salary Cluster 3 *(Opportunities to increase earnings through non-standardized salary schedules)*	758	6.00	16.00	12.70	1.50
Bargaining Cluster 1 *(Ideals of Collaborative Bargaining)*	662	9.00	24.00	18.67	2.18
Bargaining Cluster 2 *(Bargaining as a tool to enhance education)*	663	5.00	20.00	13.62	2.27
Bargaining Cluster 3 *(Bargaining related to economic necessity)*	702	2.00	8.00	3.53	.96
Peer Review Cluster 1 *(peer review and professional development issues)*	682	6.00	16.00	12.32	1.83
Peer Review Cluster 2 *(Potential benefits of peer review)*	659	4.00	16.00	9.95	2.12
Peer Review Cluster 3 *(Industrial-oriented items related to peer review)*	672	5.00	16.00	9.75	1.91

N = the number of participants who completed the entire set of cluster questions;
S.D. = Standard Deviation

Tables 4.12 - 4.14 were developed in order to answer each of the guiding research questions. Essentially, at the cluster level, these tables indicate whether Oregon educators endorsed the cluster of items or whether the cluster of items failed to gain support amongst the sampled teaching ranks. These tables are provided with a brief synopsis of the results of the cluster distributions.

Readers will note there are four categories in the following charts. The ranges are the potential scores that can be obtained on the scale. The cut point is the point that indicates agreement with a cluster based on the Likert scale that was utilized in the sampling (see Chapter Three). A higher score indicates more agreement with a clustered group of items where a lower score indicates less agreement with a clustered group of items. The average point is the mean point in the distribution that was obtained. If the mean point is above the cut point, educators endorsed the cluster. If the mean point is below the cut-point, educators did not endorse the cluster. For a complete review of this survey methodology, see the works of Rea and Parker (2005). The implication column is a brief interpretation of the derived results. A more thorough discussion will follow in Chapter Five.

Table 4.12. *To What Extent do Oregon Educators Find Merit with Alternative Salary Structures?*

CLUSTER COMBINATION	Range	Cut-point	Average point	Implication
Alternative Salary Cluster 1 *(Student Achievement as a basis for compensation)*	4-16	10	6.7	Respondents do not affirm the items in this cluster. Student achievement as a basis of pay was not affirmed.
Alternative Salary Cluster 2 *(Salary tied to educator accomplishments)*	4-12	8	7.96	Respondents, on average, are close to affirming salary for accomplishments. It is important to note that these accomplishments were not linked to student achievement.
Alternative Salary Cluster 3 *(Opportunities to increase earnings through non-standardized salary schedules)*	4-16	10	12.7	Respondents affirmed opportunities to increase earnings through non-standardized schedules. Additionally, educators affirmed the current salary system.

Table 4.13. *To What Extent do Oregon Educators Find Merit with Issues Associated with Collaborative Bargaining Strategies?*

CLUSTER COMBINATION	Range	Cut-point	Average point	Implication
Bargaining Cluster 1 *(Ideals of Collaborative Bargaining)*	4-24	14	18.7	The ideals of collaborative bargaining were affirmed by respondents. Largely, most educators found merit with the central ideals presented in this cluster of items.
Bargaining Cluster 2 *(Bargaining as a tool)*	4-20	12	13.62	Respondents demonstrated a common belief that bargaining could be a tool to enhance education. Largely, Oregon educators felt educational issues were appropriate to bring to the bargaining table.
Bargaining Cluster 3 *(Bargaining related to economic necessity & Militancy)*	2-8	5	3.5	Oregon educators did not affirm this cluster. Largely, militancy and exclusively bargaining for economic purposes was rejected.

Table 4.14. *To What Extent do Oregon Educators Find Merit with PeerReview Programs?*

CLUSTER COMBINATION	Range	Cut-point	Average point	Implication
Peer Review Cluster 1 *(peer review and professional development issues)*	4-16	10	12.3	Respondents embraced the idea of peer review. Largely, this scale was tilted towards educators endorsing the values associated with peer review.
Peer Review Cluster 2 *(Potential benefits of peer review)*	4-16	10	9.95	Respondents did not endorse all of the benefits of peer review. In particular, peer review for contract renewal was not affirmed. In fact, the response pattern could be regarded as split with a mid-point sitting nearly on top of the cut-point.
Peer Review Cluster 3 *(*Industrial-oriented items related to peer review)*	4-16	10	9.75	Respondents did not fully endorse the "industrial" mentality related to peer-review. Educators were likely to disagree on issues related to who should be conducting teacher evaluations and whether peer review would resolve problems with low performing teachers. Again, the response pattern could be regarded as split with a mid-point sitting nearly on top of the cut-point.

* The term "industrial" is utilized to describe items that are associated with a non New-Union perspective.

Demographic Analysis and Trends

After the items were scaled, as indicated in Table 4.11, a Z-score distribution was applied to each of the clusters to control for the fact that not all subscales had identical scaling (for example, alternative salary cluster number one has a different range of potential scores than the third collaborative bargaining cluster). Applying the Z-score transformation allowed each cluster to be considered in a series of multiple analyses of variances (MANOVAs) despite the difference in scaled scores. In this particular modeling technique, one predictor was paired with three related cluster values as shown in Table 4.15. To analyze demographic trends 21 MANOVA models were employed. Additionally, one multiple regression analysis was conducted.

In order to explain the analysis conducted, readers will notice Table 4.16 through Table 4.23. These tables display the results of the MANOVAs. Additionally, these tables display the results of the estimated marginal means where appropriate. It is important to note the estimated marginal means have been analyzed and presented in a standard score format for convenience and utility. Thus, readers also have a good presentation of the exact difference between groups either in text or in visual format.

Since a standard Z-score transformation was utilized, all scores were centered to zero and have a standard deviation of one. For example, if one group has an estimated marginal means of +.25 and another group has a marginal means of +1.25, this indicates that those two groups are one standard deviation away from

each other on average. Table 4.15 was utilized to demonstrate the breadth of

analysis that was conducted with the above mentioned analytical models. It is

important to note that all MANOVA models had *F* score statistics that were above

the critical level. In all cases, where indicated, the probability value of the *F*

statistic was significant.

Additionally, there was a follow-up analysis utilizing a Wilks-Lambda score

to assess how important the variable was in the overall distributions. This is useful

for estimating how much variance can be attributed to a given predictor variable

and comparing predictor variables outside of conducting further MANOVA

analysis. These scores are reported in the notes immediately following the tabled

results of the various MANOVA models. Descriptions of the interpretation are

provided on a model-by-model basis.

Table 4.15. *Conducted Analysis.*

Predictors	Dependent Variables
• Gender • Union Membership • Years of Teaching Experience • Age** • Ethnic Status • Geographic Location • Title-One Teaching Status • Building Level (e.g., elementary, middle, etc…)	Z-score of Alternative Salary Cluster 1 *(Achievement as a basis of pay)*
	Z-score of Alternative Salary Cluster 2 *(Salary tied to accomplishments)*
	Z-score of Alternative Salary Cluster 3 *(Opportunities to increase earnings through non-standardized salary schedules)*
	Z-score of Bargaining Cluster 1 *(Ideals of Collaborative Bargaining)*
	Z-score of Bargaining Cluster 2 *(Bargaining as a tool to enhance education)*
	Z-score of Bargaining Cluster 3 *(Bargaining related to economic necessity)*
	Z-score of Peer review Cluster 1 *(peer review and professional development issues)*
	Z-score of Peer review Cluster 2 *(Potential benefits of peer review)*
	Z-Score of Peer Review Cluster 3 *(Industrial-oriented items related to peer review)*

*Note: Due to data quality issues, the variable of job assignment was not analyzed. There was an error in the design of the HTML survey and the data were returned in a non-analyzable fashion. Thus, no analysis on that variable is reported. ** Note: technically, in the Multiple regression used to analyze age, the scales are the predictors and age is the dependent variable.*

Table 4.16 demonstrates that gender contributes to some differences in cluster variance. Utilizing three MANOVA procedures, it was apparent that gender influences three clusters: (a) scores on the alternative salary subtest related to standardized pay, (b) scores on the alternative bargaining subtest related to ideals of

collaborative bargaining, and (c) peer review related to the potential benefits of peer review and the "industrially oriented" peer review items represented in cluster three.

However, the Wilks Lambda test confirms that gender is not an important variable, as the actual assignment of gender did little to explain the variance within the standardized cluster scores. Note that all Wilks-Lambda values in this analysis approach 1.0, where an ideal Wilks score should be near zero. While statistically significant on four Z-score distributions, the gender variable is not highly predictive. Note that the highest range of difference between male and female respondents on any given cluster was approximately only one quarter of a standard deviation. This is further discussed in Chapter Five.

Table 4.16. *Gender Influences on Clusters.*

	Dependent Variables	Estimated marginal means of Z-Distribution		*F* Scores	Degrees of Freedom	* p. values
		Men	Women			
MANOVA 1 *(Alternative Salary Clusters)*	Z-score of Cluster 1	.13	-.09	8.078		.005
	Z-score of Cluster 2	.01	.00	0.089	1/662	.765
	Z-score of Cluster 3	-.02	.00	0.034		.857
MANOVA 2 *(Bargaining Clusters)*	Z-score of Cluster 1	-.18	.08	8.800		.003
	Z-score of Cluster 2	-.02	.02	0.192	1/578	.662
	Z-score of Cluster 3	.05	-.02	0.897		.334
MANOVA 3 *(Peer Review Clusters)*	Z-score of Cluster 1	.00	.01	0.03		.874
	Z-score of Cluster 2	.13	-.05	4.76	1/604	.029
	Z-score of Cluster 3	-.13	.05	4.90		.027

Wilks Lambda for MANOVA 1 = .987; Wilks Lambda for; MANOVA 2 = .984;
Wilks Lambda for MANOVA 3 = .982

Table 4.17 presents the results of the MANOVA analysis utilizing Union

membership as a predictor. Interestingly, larger differences than gender are

observed, with the exception of the third MANOVA related to peer- review. While

no interaction effect was estimated between gender and Union response, we can

conclude from the Wilks Lambda score that Union membership is a more powerful

predictor of outcomes on the subscales than gender differences within the first two

cluster areas. This is a potentially significant finding, as we can confirm that gender does not have the same random effect on scale scores as Union membership.

However, the Wilks-Lambda is not identifying Union membership as having a significant impact on the variance of the entire model, just a higher influence than gender. Despite this, readers will note that there are three clusters that appear impacted by Union membership. In particular, alternative salary structures and bargaining appear the most impacted by Union membership. Union members are (a) more likely to oppose linking pay-to-performance (as measured by cluster number one, student achievement as a basis of pay, as demonstrated with a Z-score of -.085 compared to a non-Union response of +.794), (b) less likely to find merit with alternative salary structures (as measured by a Z-score of -.040 compared to a non-Union response of +.564 in the second alternative salary cluster) and, (c) are less likely to see the potential benefits of collaborative bargaining strategies (as measured by the second cluster of bargaining items with a Z-score of -.06 compared to non-Union response of +0.69). This is discussed in Chapter Five.

Table 4.17. *Union Membership Influences on Clusters.*

	Dependent Variables	Estimated marginal means of Z-distribution		*F* Values	Degrees of Freedom	* p. values
		Union	Non-Union			
MANOVA 1 (*Alternative Salary Clusters*)	Z-score of Cluster 1	-0.085	0.794	14.26		0.000
	Z-score of Cluster 2	-0.040	0.564	19.48	1/667	0.000
	Z-score of Cluster 3	0.015	-0.135	1.17		0.278
MANOVA 2 (*Bargaining Clusters*)	Z-score of Cluster 1	0.012	-0.360	5.99		0.015
	Z-score of Cluster 2	-0.060	0.690	24.7	1/585	0.000
	Z-score of Cluster 3	-0.230	0.240	2.44		0.116
MANOVA 3 (*Peer Review Clusters*)	Z-score of Cluster 1	-0.003	0.230	2.57		0.109
	Z-score of Cluster 2	-0.005	0.275	3.77	1/610	0.053
	Z-score of Cluster 3	-0.001	-0.013	.795		0.373

Wilks Lambda for MANOVA 1 = .930; Wilks Lambda for MANOVA 2 = .943; Wilks Lambda for MANOVA 3 = .993

Due to the fact that educators reported years of experience in an open ended format (e.g., they indicated how many years of experience they had), a multiple regression model was conducted to determine if there was any form of linear relationship between years of experience and standardized scale values and, if so, which of those relationships were statistically best predictors. Table 4.18 presents the estimates of the fixed-effects of age on the standardized scale scores.

Largely, one scale was found to be predictive (at the $p < .05$ level) of more experience in the classroom – the third scale of bargaining – which dealt directly

with bargaining for economic purposes and teacher militancy. Teachers with more

experience were less likely to endorse the value of bargaining for economic

purposes only and engaging in militant strategies. This trend is displayed in Figure

4.5. Note the trend line in Figure 4.5, generated with the use of linear interpolation

that clearly demonstrates that teachers with more years of experience were less

likely to affirm cluster number three in the bargaining category.

Table 4.18. *Years of Teaching Experience and Impact on Cluster Scores.*

Predictors	Standardized Coefficients	P. Value
Z-score of Alternative Salary Cluster 1	.095	.066
Z-score of Alternative Salary Cluster 2	-.095	.060
Z-score of Alternative Salary Cluster 3	.072	.128
Z-score of Bargaining Cluster 1	.065	.182
Z-score of Bargaining Cluster 2	-.062	.214
Z-score of Bargaining Cluster 3	-.106	.020
Z-score of Peer Review Cluster 1	-.066	.248
Z-score of Peer Review Cluster 2	-.028	.654
Z-score of Peer Review Cluster 3	.021	.719

Note: the distribution of age was not normal. Thus, an estimation error is likely in the above results. But, it is interesting to consider the results despite this potential bias in measurement.

Figure 4.5. *Relationship between Number of Years Experience and Bargaining*
Cluster Number Three.
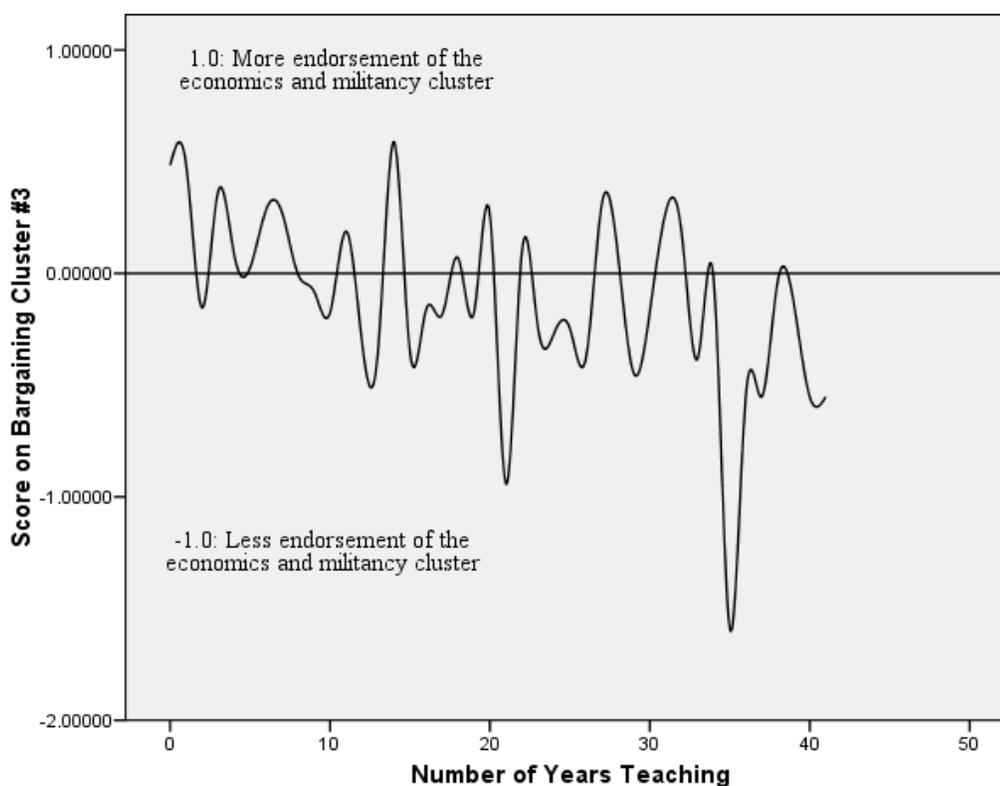
Note that more experience often indicates a smaller standardized score on that
particular cluster of items.

Table 4.19 presents the results of the impact of age on cluster scores. Again,

a MANOVA model was selected to determine whether any relationship exists

between age and scores. Interestingly, various relationships were discovered. The

age categories appear to directly influence mean scores on the Z-distributions.

These results are presented in Figure 4.6.

The first cluster of alternative salary structures is influenced by the age of a

respondent. Teachers in the fifth category of age were more likely to want to link

achievement to salary. The second cluster of the alternative salary category (related

to teacher performance and accomplishments) is influenced by the age category. In particular, teachers in the age range of 50-60 years old were less likely to affirm the cluster compared to other groups, suggesting older teachers were more likely to affirm the traditional salary schedules. The second cluster of bargaining (related to the potential benefits of collaborative bargaining) is also influenced by the age category. Again, 50-60 year old teachers were less likely to affirm this category compared to other groups. Finally, the third cluster of the bargaining (economics and militancy) category is influenced by the age. In this category 40-50 year old teachers were potentially different than their 20-30 year old counterparts.

It is important to note that the 60+ age category had few respondents (N= 24). Thus, any inferences from the fifth age category are potentially flawed due to sample size. A larger sample size would be needed to determine if the trend line, as illustrated in Figure 4.6 is statistically valid. An interesting side note is the fact that Wilks- Lambda demonstrates that age is more important than gender as a predictor of standardized scale score values. Yet, it is still not as important as Union membership.

Table 4.19. *Age Influence on Cluster Scores.*

	Dependent Variables	F Statistic	Degrees of Freedom	* p. values
MANOVA 1 *(Alternative Salary Clusters)*	Z-score of Cluster 1 Z-score of Cluster 2 Z-score of Cluster 3	2.50 4.40 0.75	4/663	0.041 0.002 0.534
MANOVA 2 *(Bargaining Clusters)*	Z-score of Cluster 1 Z-score of Cluster 2 Z-score of Cluster 3	.685 .931 6.384	4/582	0.603 0.445 0.000
MANOVA 3 *(Peer Review Clusters)*	Z-score of Cluster 1 Z-score of Cluster 2 Z-score of Cluster 3	2.185 2.607 1.241	4/607	0.069 0.035 0.292

Wilks Lambda for MANOVA 1 = .951; Wilks Lambda for MANOVA 2 = .947; Wilks Lambda for MANOVA 3 = .969.

Note that the estimated means are displayed below. With six groups, it is not practical to table the results across three models.

Figure 4.6. Age Influence on the Four Significant Z-Distributions.
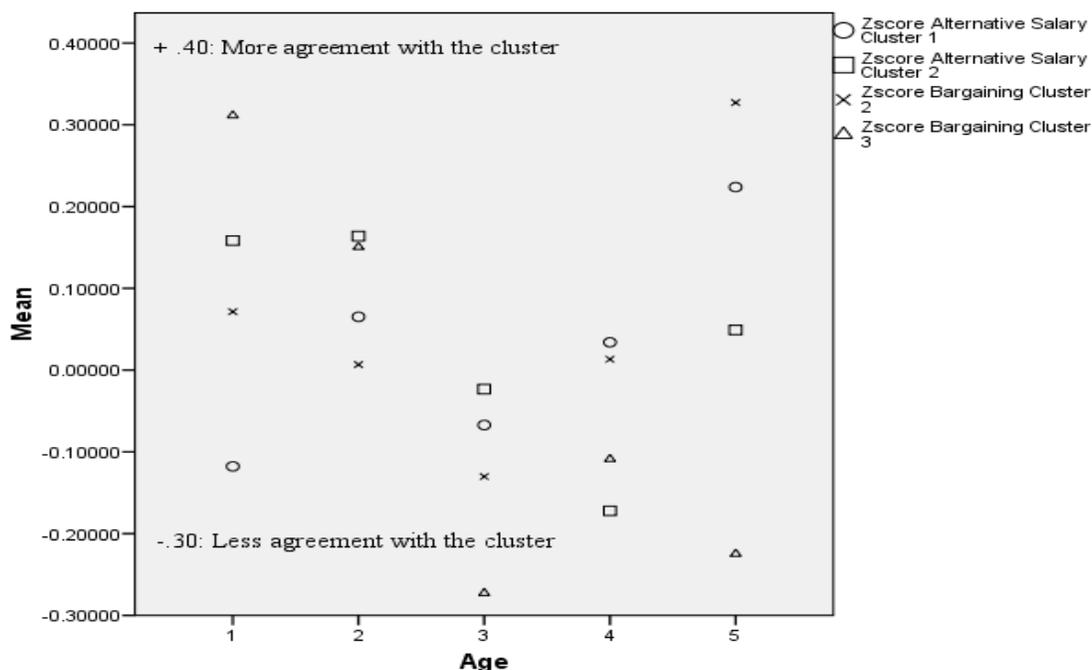
Note that all have distinct trends. Where 1=20-30 years old; 2=30-40 years old; 3=40-50 years old; 4=50-60 years old; 5= 60+ years old.

Table 4.20 and Figure 4.7 show the impacts of ethnicity on the Z-distribution. Again, ethnicity does not appear to be a significant contributor to the distribution as measured by the Wilks Lambda statistics. Note: all Wilks statistics are still above the .90 level, indicating that ethnicity is not that important to the distribution of the responses and further unidentified variables are likely to predict more about the cluster of responses.

The area that appeared to be most impacted by respondent ethnicity was related to the first cluster of bargaining. It should also be noted that the two areas that were significantly different were the non-responders (N=71) and Asian-American/Pacific Islanders (N=12). However, since both groups were not even half

a standard deviation away from the mean, and considering the sample size limits,

this predictor variable could be considered ambiguous.

Table 4.20. *Ethnic Status Influence on Cluster Scores.*

	Dependent Variables	*F* Statistic	Degrees of Freedom	* p. values
MANOVA 1 (Alternative Salary Clusters)	Z-score of Cluster 1 Z-score of Cluster 2 Z-score of Cluster 3	0.90 1.22 1.27	6/668	.492 .294 .269
MANOVA 2 (Bargaining Clusters)	Z-score of Cluster 1 Z-score of Cluster 2 Z-score of Cluster 3	3.48 .766 1.61	6/587	.002 .597 .140
MANOVA 3 (Peer Review Clusters)	Z-score of Cluster 1 Z-score of Cluster 2 Z-score of Cluster 3	1.405 .541 .999	6/612	.210 .777 .425

Wilks Lambda for MANOVA 1 = .970; Wilks Lambda for MANOVA 2 = .951;
Wilks Lambda for MANOVA 3 = .944.
Note that the estimated means are displayed below. With six groups, it is not
practical to table the results across three models.

Figure 4.8. : Estimated Means Displaying Significant Differences Between Asian Americans and Pacific Island Responders and Non-Identified Participants Compared to Other categories in Relation to the First Cluster of Bargaining Items.
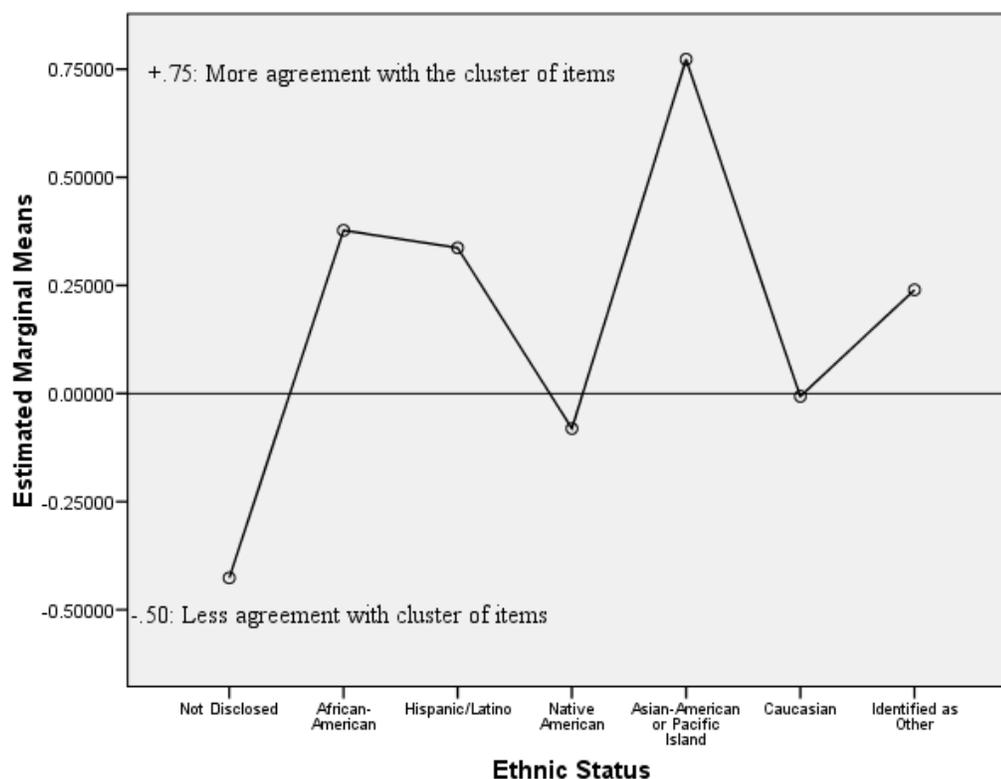
Table 4.21 illustrates that there is one cluster that appears to be impacted by Geography. Particularly, the second cluster related to bargaining dealt with bargaining as a tool. Figure 4.9 was developed to visually identify which geographic areas have differences in this cluster. It would appear the most significant differences in this cluster of items can be found by comparing the Portland-metro area respondents to the coastal-respondents and to East-of-the-Cascades respondents. The groups appear to be a half a standard deviation away from each other in this cluster of scores. As discussed above, this cluster is associated with several of the ideals of collaborative bargaining. Thus, indicating

Portland metro respondents were less likely to endorse the cluster while the coastal

respondents and the East-of-the-Cascades respondents were more likely to identify

with collaborative processes.

Table 4.21. *Geographic Influence on Cluster Scores.*

	Dependent Variables	*F.* Statistic	Degrees of Freedom	p. values
MANOVA 1 *(Alternative Salary Clusters)*	Z-score of Cluster 1	2.72	4/668	.068
	Z-score of Cluster 2	.662		.600
	Z-score of Cluster 3	.668		.639
MANOVA 2 *(Bargaining Clusters)*	Z-score of Cluster 1	1.38	4/586	.236
	Z-score of Cluster 2	2.75		.027
	Z-score of Cluster 3	.875		.479
MANOVA 3 *(Peer Review Clusters)*	Z-score of Cluster 1	.667	4/610	.605
	Z-score of Cluster 2	.405		.815
	Z-score of Cluster 3	1.82		.124

Wilks Lambda for MANOVA 1 = .973; Wilks Lambda for MANOVA 2 = .939; Wilks Lambda for MANOVA 3 = .979

Figure 4.9.   Differences Between Geographic Regions Across the State of Oregon Related to the Second Cluster of Items in the Bargaining Subscale.
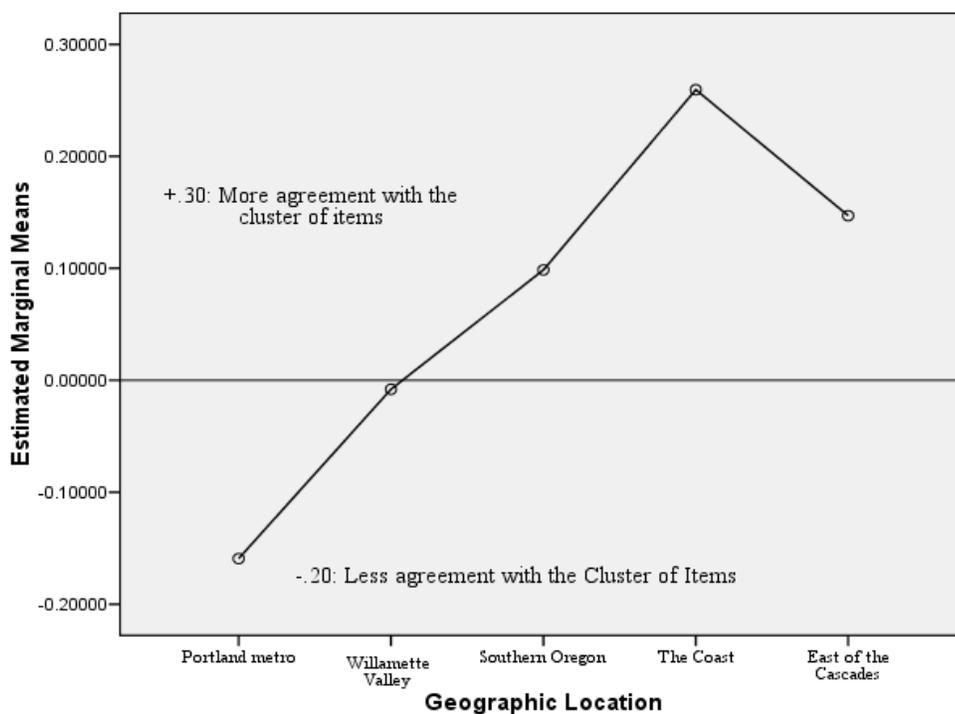
Note that Portland-metro has the lowest standardized score while the coast and East-of-the Cascades which have the highest scores.

Table 4.22 presents the results of the MANOVA, comparing Title-One educators to non Title-One educators. Interestingly, there were no random effects attributed to Title-One status. Not surprisingly, this is also consistent with the simple means comparison available in Appendix B.

Table 4.22. *Title-One Teaching Status as a Predictor on Standardized Scale Scores*.

	Dependent Variables	**F. Statistic**	**Degrees of Freedom**	**p. values**
MANOVA 1 *(Alternative Salary Clusters)*	Z-score of Cluster 1 Z-score of Cluster 2 Z-score of Cluster 3	.904 1.90 .543	1/717	0.829 0.329 0.790
MANOVA 2 *(Bargaining Clusters)*	Z-score of Cluster 1 Z-score of Cluster 2 Z-score of Cluster 3	1.40 1.70 .164	1/610	0.420 0.092 0.728
MANOVA 3 *(Peer Review Clusters)*	Z-score of Cluster 1 Z-score of Cluster 2 Z-score of Cluster 3	1.20 2.10 0.24	1/621	0.387 0.287 0.559

Table 4.23 presents the results of building level assignment on each of the

clusters. No significant differences were noticed across grade level assignments.

Table 4.23. *Building Level Assignment as a Predictor on Standardized Cluster Scores.*

	Dependent Variables	F. Statistic	Degrees of Freedom	p. values
MANOVA 1 *(Alternative Salary Clusters)*	Z-score of Cluster 1	1.19		0.312
	Z-score of Cluster 2	.36	3/666	0.781
	Z-score of Cluster 3	.358		0.778
MANOVA 2 *(Bargaining Clusters)*	Z-score of Cluster 1	1.59		0.188
	Z-score of Cluster 2	1.85	3/586	0.136
	Z-score of Cluster 3	1.05		0.367
MANOVA 3 *(Peer Review Clusters)*	Z-score of Cluster 1	.474	3/611	0.700
	Z-score of Cluster 2	1.31		0.268
	Z-score of Cluster 3	2.35		0.071

Researcher Impressions &Further Analysis on the Cluster Findings

It is important to point out that the clusters of items all formed different associations with each other. However, understanding those associations in the form of Euclidean distances (as utilized in this form of HCA) can be difficult to interpret. This is so particularly in the educational research tradition that is more accustomed to various forms of regression analysis to explain relationships. Fortunately, there is nothing that precludes a supplemental analysis to help describe the data.

In order to explain the results of the HCA further, additional analysis was undertaken to capture the relationships between the clusters. This can be conceptualized on two levels: (a) within dimension relationships (e.g. do clusters correlate with each other within a given group of clusters as identified in the HCA?); and (b) between dimension relationships (e.g., do clusters correlate with

clusters outside of their HCA groupings such as an interaction between a salary

cluster and a bargaining cluster?).

To review, some clusters were noted to be linked to another cluster, and

other clusters were found to be completely discrete from other clusters. Yet, the

limitation of the above HCA analysis was related to the fact that no relationships

were able to be identified across dimensions (e.g., the peer review relationship with

collaborative bargaining). Additionally, the HCA analysis can be difficult to

decipher in terms of what has been termed within-dimension relationship. As an

example of this measurement finding, consider the fact that the first and second

cluster in the peer review category appear to be closely linked while the third cluster

appears to be discrete from those two clusters. Several questions remain, however:

How close are these linkages; are the links positive or negative; could there be

relationships outside of the cluster groupings; if so, to what extent do these

relationships potentially exist?

A correlation analysis was conducted to further understand how clusters

interact with each other as a way to better understand the relationship between the

clusters,. This analysis was followed up with a simple regression curve estimation

technique to understand the link between the various identified clusters. As a

technical note, the regression curve estimation utilized two regression techniques

(linear and quadratic) to look at how much variance can be explained across

identified clusters.

Table 4.24 presents the results of the correlation analysis and highlights the

clusters that appear to correlate with each other. As a general rule, correlations that

are in the range of .30 are thought to be weakly correlated with each other while

correlations that are .50 are moderate, and correlations that achieve a coefficient of

.70 are thought to be highly associated. All items that approached the moderate

level are indicated with the asterisk symbol (*).

What is revealed from this correlation analysis is that the area of peer review

has relationships across the three clusters, two of them positive and one of them

negative. At the same time, there are no important correlations within the other

clusters or between the other clusters. This is important to note as it appears that

beliefs around labor reforms are not necessarily influencing each other. In other

words, one sub-test did not appear to predict another subtest, with the exception of

the peer review subtests which only correlated with each other. Thus, we can

confirm that there are no between dimension correlations and there are limited

within dimension correlations. Importantly, those limited within dimension

correlations only occur within the three cluster groupings of peer review.

Table 4.24. *Simple Pearson's Correlation Table.*

		Alternative Salary Clusters			Bargaining Clusters			Peer Review Clusters		
		#1	*#2*	*#3*	*#1*	*#2*	*#3*	*#1*	*#2*	*#3*
Alternative Salary	#1	1.0	.37	-.18	-.14	.29	.14	.21	.39	-.20
	#2	.37	1.0	.12	.11	.22	.00	.27	.33	-.22
	#3	-.08	.12	1.0	.29	.03	-.03	.05	.00	.08
Bargaining	#1	-.14	.11	.29	1.0	.12	-.16	.18	.09	.05
	#2	.29	.22	.03	.12	1.0	.02	.32	.38	-.14
	#3	0.14	0.00	-0.03	-0.16	0.02	1.0	-0.09	0.07	0.03
Peer Review	#1	0.21	0.27	0.05	0.18	0.32	-0.09	1.0	**0.55***	**-0.52***
	#2	0.37	0.33	0.00	0.083	0.37	0.07	**0.55***	1.0	**-0.54***
	#3	-0.20	-0.22	0.08	0.05	-0.13	0.02	**-0.52***	**-0.54***	1.0

Figure 4.10 illustrates the positive relationship between peer review subtest number one and peer review subtest number two. Figure 4.11 illustrates the negative relationship between peer review cluster number three and cluster number one. Figure 4.12 illustrates the negative relationship between peer review cluster number three and cluster number two. A simple interpretation of these figures follows.

Figure 4.10. *Relationship Between Peer-review Cluster Number One and Cluster Two.*
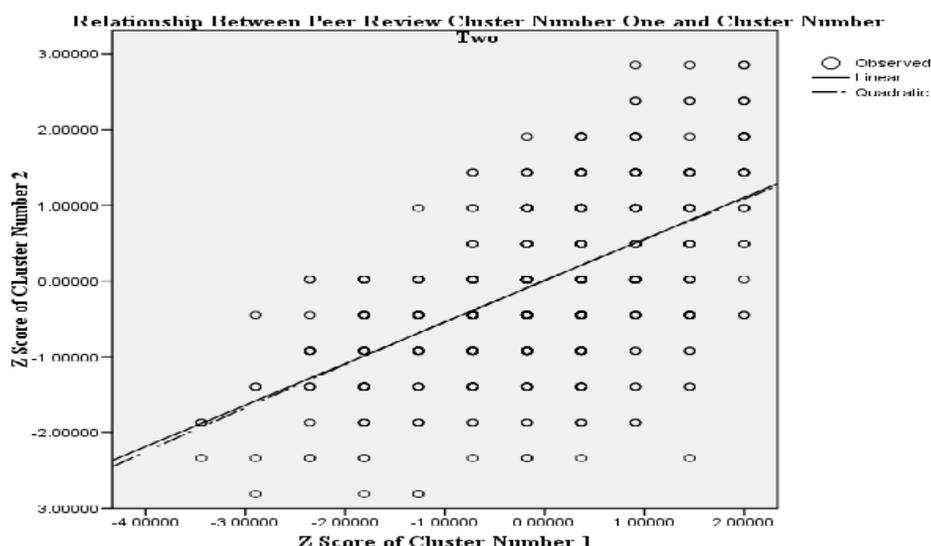
As educators endorsed peer review cluster number one, they were also more likely to endorse peer review cluster number two. Note that the relationship is positive and that 30% of the variance in each cluster is explained by the other cluster using both a quadratic and linear curve estimation technique. Also note that the relationship is truly linear, as the quadratic line is not visible.

Figure 4.11. *Negative Relationship Between Peer-Review Cluster Number One and Cluster Number Three.*
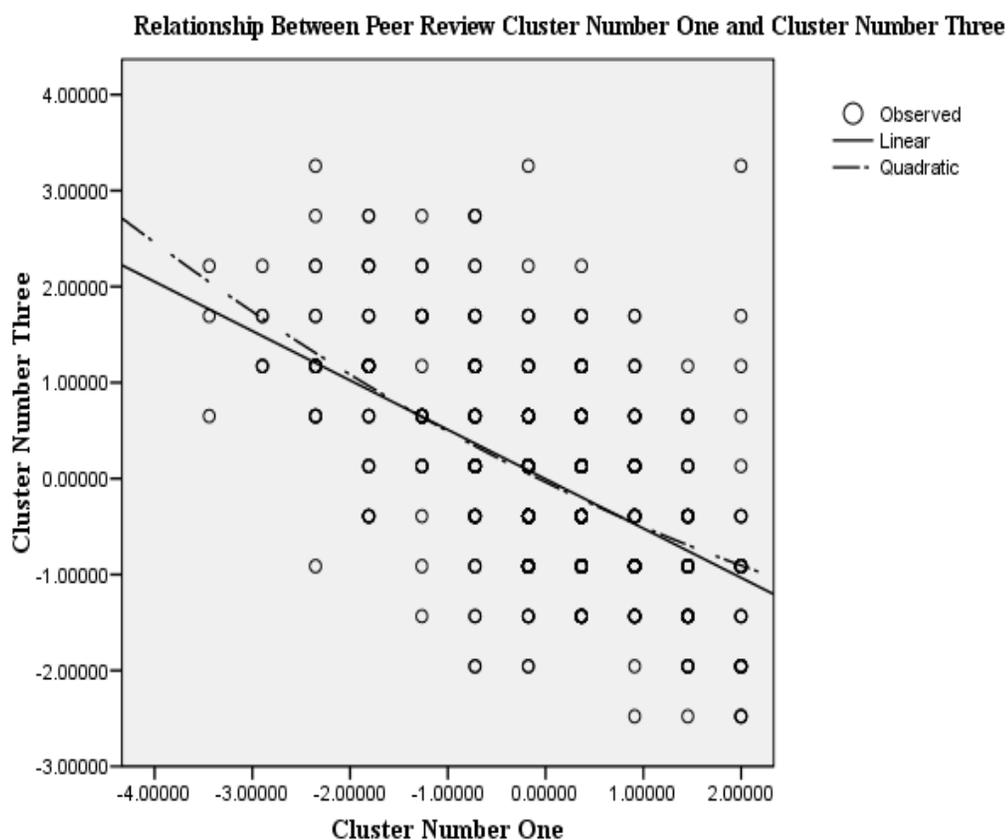
As respondents affirmed the ideals that were associated in peer review cluster number one they were less likely to affirm the ideals in cluster number three. Note the curve estimation technique was able to explain 27 percent of the variance across clusters with both the linear and quadratic models. Also, note the quadratic fit-line is not easily viewed, also suggesting a strong linear relationship.

Figure 4.12. *Negative Relationship Between Cluster Number Two and Cluster Number Three in the Area of Peer Review.*

Relationship Between Peer Review Cluster Number Three and Cluster Number Two
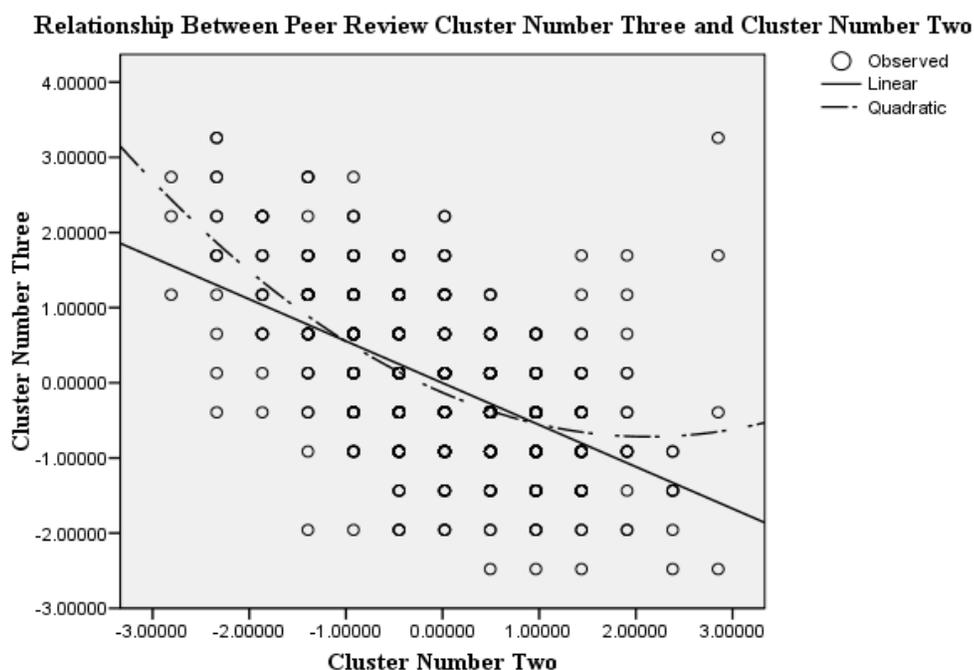
As educators endorsed the value of peer review, they were less likely to endorse the traditional items related to the peer review process. Note the quadratic model explains 33 percent of the variance. Note the quadratic line is more visible compared to the other two previous curve estimates. Suggesting there is some predictable leveling off in the relationship between distributions, which means the relationship is not strictly a negative linear relationship in the present data.

It would appear that as respondents endorsed the traditional evaluation program (cluster number three) which does not include peer review, they were less likely to find merit with peer review programs as demonstrated by the themes of cluster number one and cluster number two. Conversely, cluster number one and number two (both dealing with post-industrial attitudes towards labor reforms) were found to be positively related. These findings are not surprising or unpredicted.

Quantitative Summary

The results of the quantitative analysis reveal several findings related to the study objectives. First, it is observed that the survey questions formed nine clusters of response patterns, some of which appear to be related to each other, but treated as separate clusters based on their estimated rescaled distance from one another (see the above dendograms in Figures 4.2-4.4). These clusters, when treated as individual subscales, demonstrate a range of statistical reliability suggesting that further data collection is warranted either with the current instrument in an expanded data-collection effort, or a refined instrument based on the learning from the factor analysis and HCA analysis. This limitation will be discussed in the proceeding section on study limitations and further research endeavors. It should also be pointed out that a factor analysis failed due to a poor goodness of fit estimate.

When these clusters were scaled and the results analyzed, a result was that Oregon educators embraced certain components of New-Union labor reforms, rejected other components of New-Union labor reforms, and appeared split on certain components of New-Union labor reform strategies. In particular, the majority of educators rejected the idea of linking salary to student achievement, yet remained open to the prospect of alternative salary structures besides a traditional salary plan. Moreover, educators embraced the ideals of the collaborative bargaining process. This suggests that Oregon educators recognize the value of bargaining in a collaborative format. While endorsing peer review for professional development, educators seemed split on the benefits and purposes of peer review,.

One of the clusters of items was endorsed, while two others demonstrated a distribution that suggests divided opinions on the use of peer review in K-12. These results will be discussed further in Chapter Five.

A series of 21 MANOVA models and one multiple regression model were employed to analyze demographic trends. It was determined that gender, Union-membership, years of experience, age of respondent, and years of teaching experience all influenced standardized scale scores across the indicated sub-scales. Again, as discussed previously, each of these influences was unique, with some having more predictive capabilities than others. It is interesting to note that Union membership appeared to be a more important variable than the other demographic features as measured by a Wilks-Lambda statistic. As discussed in Chapter Five, the results of this analysis may shed light on what ideologies lead individual educators to join a teachers' Union or not. Interestingly, building-level assignment and Title-One status had no effect on the results.

Additionally, between dimension and within dimension correlations were assessed using a simple correlation analysis followed by both a quadratic and linear curve estimation technique. These were utilized to understand the relationship between clusters that appeared to influence each other. Peer review clusters were the only clusters found to influence each other. There were no correlations across cluster dimensions (for instance, peer review clusters did not interact with any bargaining or alternative salary clusters).

PART TWO: Qualitative Results: Interviews

As a part of the present study, the researcher was interested in capturing individual teacher beliefs related to labor reforms (see Chapter Three). Thus, the researcher interviewed four teachers to generate four distinct case profiles of beliefs related to the Union reforms in the present study. The following are the results of those profiles. The results were shared with the four participants in order to solicit further feedback and gain a better interpretation of their beliefs. As mentioned in Chapter Three, the participants were asked to participate at the conclusion of the quantitative survey. However, the quantitative analysis was not finalized which meant the participants and the researcher had no access to formal survey results during the interview process. Additionally, it is worth mentioning that the interviews were in place of a focus group as planned in the original research proposal, as mentioned in Chapter Three.

Each participant was asked a series of open ended questions to help frame their beliefs related to the Union in general and the emerging Union reforms in particular. The point of this inquiry was to develop a richer, more descriptive analysis of the issues being discussed. As mentioned in Chapter Three, responses were captured electronically and in writing via a working document. Their responses to these open ended questions would serve as the basis for the analysis and case summary. There were four broad themes that were analyzed from the recording and transcriptions: A) general beliefs about teacher Unionization, B) beliefs related to alternative salary structures; C) beliefs about collaborative

bargaining, D) beliefs about peer review. Additionally, participants were allowed to simply share any other comments. As a matter of interview design, these four broad themes intersected each interview session which provided the basis for a cross case analysis. These case summaries were then compared to one another to generate the cross case analysis.

Respondents reviewed their cases and provided the researcher with approval or disapproval of the case analysis as a form of member checking (Gall, Gall and Borg, 2005). This helped the researcher assure the case was representative of the interviewee.

Interview #1: Mid-Willamette Valley Career K-12 Educator

Jane (fictitious name) is a career educator in the Mid-Willamette Valley. She was intrigued by the nature of the study after being invited to participate via the random sampling method. Due to curiosity in the study, she volunteered to participate in a focus group or interview. Her responses were highly informative to the researcher, who attempted to capture educator beliefs' around these labor reforms.

Jane stated that "no matter what may not work well in the Union, we need the Union." Jane believed that teacher Unions should continue existing in a similar way as they have in the past. She stated that "someone has to watch out for the teacher." She went onto state that "teachers give so much to the kids. Who is making sure they [teachers] are being taken care of?" She believes that teachers

have the potential to become a marginalized group – they are in a profession characterized by service to society at-large. Additionally, Jane felt that teachers are expected to give more than other professions.

As a matter of interest, Jane brought up the idea of "trickle-down." Jane held the belief that a well supported work force in the school system will provide high quality educational services. In other words, "take care of the teacher and the children in the classroom will be taken care of." Thus, the priority of the Union was to ensure the well being of teachers, who will in turn, ensure the well being of learning in the classrooms. As a result of Jane's 20-year career, she made this point in relationship to teacher Unions, "students don't actually benefit from over-extended teachers." Jane believed that the role of the Union is to represent the rights of teachers.

In regards to peer review, Jane felt strongly that peer review is not appropriate for determinations related to contract renewal. Peer mentoring or review programs should be limited to professional development, and should not involve contractual issues. Peer review programs should provide a source of advice, support and encouragement. In particular, Jane was able to think of three functional ways that teachers could support each other professionally: (a) teachers could observe each other for constructive feedback on lessons and pedagogical issues; (b) teachers could suggest areas for improvement in a confidential and supportive way towards their peers; and, (c) these activities should be done in the context of encouragement. In other words, the peer review component should have a supportive rather than evaluative theme.

Jane stated that "quality control" is the job of the principal. She also brought up the point that schools already have enough cultural and political components that making peer review a component for contract renewal could create a culture of hostility and fear. Jane asked the researcher, "How would you like to go to work every day feeling like you were being judged and discussed by the peers who should be there to support you?" Jane's primary concern with peer review was the implication to school culture, and the fact that it may not contribute towards a positive school climate. Jane believed that an effective use of a "plan of assistance" is a far more beneficial and structured way to remove a poor performing teacher compared to a peer review plan or peer review process.

For the record, Jane wanted to convey the idea that teacher peer review programs would not just alienate or isolate teachers. Rather, Jane believed that peer review programs would "demoralize" the teaching ranks.

In regards to alternative pay plans, Jane believed that there are certain teaching assignments which require educators to go above and beyond. Jane used the term "combat-pay" to describe the issue with alternative pay. She felt strongly that teachers should have opportunities to earn more money if they are working in difficult assignments or taking on added responsibilities.

Jane brought up an interesting point, "highly skilled and experienced teachers tend to move to high achieving schools." In Jane's 20 years of experience she has observed a trend: many of the best teachers do not stay in the toughest schools. Somewhere along the way, they decide to move to serve less stressful and demanding school assignments. Jane referred to this phenomenon as the "drift."

Jane even brought up the point that teaching in a high-stress school is an entirely
"different job" than teaching in a low stress school. She elaborated this point by
comparing a few examples of high stress school environments compared to lower
stress school environments. By all accounts, Jane had a pragmatic solution: there is
no problem with paying teachers more who want to accept the difficulty of high
stress teaching assignments.

As far as standardized testing as a means of determining teacher pay or
bonuses, Jane was opposed to this proposed reform. Jane felt that there are too
many variables to fairly assess whether a teacher has been doing their job and
standardized testing does not contribute towards that determination. Jane believed
that the issue of fairness has to be considered when determining educator salary
levels. If it does not meet the standard of fairness it is "definitely not an adequate
way" of determining salary levels.

Jane has worked the majority of her career in a Willamette valley school
district that had experienced negative labor-management relationships in the early
1990s. This experience framed her responses to the questions related to bargaining
and the role of bargaining.

Jane believed that school districts should bargain economic issues, teacher
rights, and certain policy concerns. However, issues related to curriculum should
not be discussed at the bargaining table. As Jane pointed out, schools should
choose curriculum. Jane believed that prep times, number of class preps, and
potentially class size are examples of issues to bargain, while on the other hand,

teacher discretion over curriculum should best be left to curriculum teams and building processes.

When asked if there should be any Union reforms, Jane stated she would like to see more bargaining around in-service and training. Particularly, Jane felt that the Union should work to establish more funding for teacher training.   She believed the Union could do more to assure teachers opportunities for professional development. That aside, she believed the Union should continue in its mission to work on economic issues and job related rights.

Interview #2: Southern Oregon Educator

Jim (fictitious name) is an educator in Southern Oregon. After taking the survey he was very interested in the study that was being conducted. He was motivated to contact the researcher because he recognized that some of the areas being studied went against the traditional labor paradigms in the State of Oregon. He was curious who the researcher was, why the researcher was studying these topics, and how he could access the results.

Jim has what could be considered a unique perspective on K-12. Prior to working in the public school system, he spent 20 years in industry. He self disclosed that he has degrees in journalism and history, which is why he ended up teaching high-school social studies. Many of his responses were framed from his comparison of the K-12 teaching world to the private sector world where he worked previously.

When asked what his overarching beliefs were related to the teachers'
Union, Jim stated, "The Union is bloated…" and "pursuing an aggressive alignment
with the Democratic party." Jim spoke highly of the efforts of his local chapter, yet
"hates the State level." Jim informed the researcher that his views were
diametrically opposed to the structure and function of the teachers' Union, and he
was ready for labor reforms in the State of Oregon. It should be noted that Jim has
strong feelings that individuals have a right to form labor Unions and have a right to
Unionize.

When asked to elaborate his views on this, Jim stated that he was a moderate
Republican and felt completely isolated from the mainstream of the Union yet
believed that Unionization was a right of any American group. He felt strongly that
the Union exists to protect "incompetent teachers" and that the teachers' Union
needs to take a more active role in modernizing its practices and step away from the
"ruthless preservation of teacher jobs" as a top priority.

When asked who the Union supports (teachers or students), Jim elaborated
his beliefs. "At the end of the day, the Union is there to protect the teachers." Jim
felt strongly, that the Union has become "anemic in its agenda to children" and only
serves to propagate the system for the benefit of veteran teachers.

As mentioned above, Jim believed strongly in the right for individuals to
collectively bargain. Yet, he feels that certain labor reforms are needed. He shared
his position on what reforms may be necessary. Jim believed the most pressing
issue for reform is related to salary structures. This belief was influenced by
multiple perspectives.

Jim was able to reduce this belief to a group of central ideas. First, the public has strong beliefs in the value of performance; it is easier to ask the public for money when it sees results. This is complicated by the fact that teachers do not own their grades or scores which are often perceived of as the results of a teacher's performance. Jim pointed out that students also contribute toward the learning process and the obtained learning outcome. Thus, linking test results and grades to salary is a flawed model. However, according to Jim, something must be done to get the teachers' Union to realize that people operate on a principal of "self-interest." The paradigm of teaching as a low paying social service field does not work for Jim; teaching is Jim's profession and he expects to be compensated for his talents and skills as in other professions.

As an important follow-up to this topic, Jim brought up the issue of generational differences and the sustainability of the teaching ranks based on a baby-boomer model of employment. Jim believed that younger generations, such as the millennial generation, are going to be less tolerant of a standardized salary schedule because it does not recognize individual differences and accomplishments. Jim was concerned that the field of teaching may lose its competitive edge compared to other fields if it fails to create a salary system that rewards individuals for their unique contributions and merits. Importantly, Jim brought up the issue of fairness in the same dialogue. He mentioned that the central roadblock towards accomplishing this effort is the concern of how to reward individuals in a fair manner.

Jim mentioned another strategic reform that could be brought forward. That included the Union helping change the conversation related to public education. Jim would like to see the Union utilize its positional power to create conversations with key stakeholders to develop better salary structures and economic capacities for teachers.

When asked about peer review programs, Jim said that would "be like inmates running the asylum." There needs to be some formal method of evaluation, and teachers are probably not capable of evaluating each other with objectivity due to simple building politics. To elaborate this point, he shared several anecdotal highlights of his career. The experiences led him to believe that an objective, removed evaluator is better than the evaluator being the teacher or department chair next door. Jim mentioned that his observation of teachers is that they are a "thin-skinned, paranoid lot." This is the reason why many teachers are resistant towards observation or evaluation of any kind.

When asked about alternative bargaining strategies Jim expressed belief that bargaining is appropriate for policy issues - yet, not for learning issues. Policy can include issues like class-size, calendar, planning time, professional development opportunities, etc… Yet, it cannot include things related to instructional decisions. Jim expressed the strong feeling that teachers are trained as professionals. Those professional decisions should guide the instructional and learning process – not the bargaining table. Jim felt it would be professionally inappropriate to bring up curriculum issues at the bargaining table and that teachers should "just be trusted to make the right choices in their classroom."

Interview #3: Teacher Union Leader

Kathy (fictitious name) is a teacher Union leader in the Willamette Valley. She has been involved with teacher Unions for 11 years as a labor organizer at the local and state level. She was interested in the labor reform issues that were presented in the survey and contacted the researcher for a follow-up interview.

Kathy characterized her role in the Union as that of an individual trying to improve working conditions for teachers. Kathy shared that one of her first priorities at the local level was to create a sustainable mentoring program for new teachers. Kathy stated that the Union has the potential to be a powerful force for learning endeavors -- and shared several anecdotal observations of how the Union could contribute to the mission of K-12 public education. In particular, she shared how the mentoring program that she developed has become a model for how a Union can support its members in issues beyond economics.

When asked what her overarching beliefs were related to teacher Unionization, Kathy stated that "teacher Unions should exist" and the reason they should exist is because there are administrators who do not necessarily operate within ethical parameters. She believed that in an ideal world, "there would be no need for Unions" and noted that some of the strongest Union schools in the state have some of the "worst management." The Union, overall, exists to ensure that teachers are treated fairly and equitably.

However, simply saying, "the Union exists for teachers" was not an adequate way to capture Kathy's beliefs related to the Union. Kathy also expressed the sentiment that teacher Unions have obligations to students and learning. Kathy expressed the belief that when "teachers are supported through a Union, they are able to provide services for students."

Kathy believed that the first useful labor reform that could occur across the State of Oregon would be related to a sustainable way for the teachers Union to give feedback on legal and policy issues. Kathy shared that the teachers Union utilizes a lobbyist approach to give feedback on the educational reform agenda, and finds that approach has little merit or value as the state system has become quite convoluted.

Essentially, no one in state government or politics is required to hear the concerns of the Union; rather, the concerns they hear from the Union are largely based on political momentum. In other words, Kathy believed that the Union holds political power; but that political power is actually inadequate for communicating the message of the educators it represents. Essentially, in Kathy's opinion the Union needs to work for a sustainable way to give feedback on multiple issues impacting the teaching profession in collaboration with other key stakeholders. As Kathy pointed out, "there are a lot different acronyms out there…" referring to the Oregon School Boards Association, Confederation of Oregon School Administrators, etc… At some point, in Kathy's opinion, all of these groups would benefit from a unified approach towards solving educational policy issues. The largest, and most powerful Union reform, would be to facilitate that process.

In regards to peer review, Kathy had several thoughts due to the fact that she started a mentoring program for her current school district. Essentially, Kathy believed that peer review and mentoring is an issue that is beyond just professional development and contract renewal. It is a core issue in public education: who is responsible for the quality control of public school classrooms?

Kathy believed that the attitudes and behaviors of teachers should be discussed openly by groups of educators and that educators are in fact accountable to each other; although not in the direct sense. That is, teachers are accountable to each other, but that does not mean "I want to evaluate the teacher next door." That accountability is not necessarily appropriate for contract renewal issues. Contract renewal is a concern of the administrative ranks.

Kathy elaborated this by stating that the teaching profession lacks a professional peer monitoring system; whereas, other professions have adopted a peer monitoring system (e.g., the bar association for lawyers). What is in place for teachers in the State of Oregon, Teachers Standards and Practices, according to Kathy, does not necessarily take into account an exclusive peer perspective when making determinations related to potential teacher misconduct or violations. Kathy believed the teaching profession would be enhanced by placing a heavier emphasis on what peers believe related to professional behaviors.

On another level, Kathy believed strongly that new teachers need some form of induction program that continues after formal teacher training ends. She also believed it is highly important for a more knowledgeable peer to be involved in that process.

When asked about bargaining strategies, Kathy stated that she has utilized interest-based, collaborative strategies in the past. She was very familiar with the academic terminology related to these strategies; and said that she has been involved in propagating these bargaining strategies across the state. In Kathy's opinion, these bargaining strategies tend to work best. She stated that people get "focused on the issues" that need to be bargained versus staying "stuck on a perspective." By utilizing a collaborative strategy, Kathy believed that teacher Unions can utilize a process that is grounded in ideals; rather than polemics.

Kathy shared that many of her most productive bargaining sessions included a bargaining process that utilized an interest based model that began when everyone (teachers and administrators) (a) identified common goals for the district; (b) focused on those goals through the bargaining process; and, (c) developed contracts that worked for those goals. Essentially, the bargaining process was driven by shared ideals versus competing interests.

In regards to salary structures, Kathy shared that she believes the teaching profession needs some modifications to current salary schemes; yet, also felt that whatever modifications are made need to be assessed from the perspective of fairness to all teachers. Kathy illustrated that the teaching profession needs a singular salary structure because it has become the standard; yet that singular structure can, and should, include opportunities for individual teachers to earn more based on their contribution to the building.

For instance, Kathy illustrated with the point that some teachers bring great skills in one particular area to a building. What is preventing a building

administrator for rewarding those highly skilled areas with an "additional work stipend" when the skills can improve the overall performance of the building? The teacher's entire salary would not be tied to the added skill, but, it would give them an opportunity to earn more in addition to the current salary scheme. Kathy believed the best, and most effective use of alternative pay structures, would be related to a "simple fee for an extra-duty" model. In Kathy's opinion, those extra duties schedules should be flexible and based on building needs.

Interview #4: Willamette Valley Educator

Wilma (fictitious name) is an educator in the upper Willamette Valley. She contacted the researcher because she believed the questions in the survey were "different than the previous Union sponsored surveys" that were looking at similar or related issues.

When asked about the role of the Union, Wilma presented her opinions. Growing up, Wilma was raised by a family that was not supportive of Unions. Her mother was a small business owner. So, when Wilma entered the teaching profession, she was at first skeptical of what the Union could offer. She went onto state that, "it has been good to see the Union working for teachers – it's not a bad thing to have a Union." Overall, Wilma believed the Union should exist and that it can offer much to improve the potential of public education.

When asked about peer review. Wilma brought up her view on what peer review could mean: (a) voluntary peer review as a part of professional development

activities; and (b) peer review programs that were mandatory – either for contract renewal purposes or professional development. She believed the real issue with peer review is "why" it would be initiated.

Wilma shared that one of the most powerful growth tools that she has utilized is peer-coaching and peer review. This is a voluntary process that is completely confidential. The peer review results never get shared with an administrator and are never utilized to determine contract renewal, or otherwise. Wilma believed that if more teachers were to take advantage of the peer review process, the results for classroom performance could be significantly enhanced.

In Wilma's particular district, a master-teacher visited the classrooms of teachers and provided feedback. This feedback was utilized to make improvements and enhance the learning experience for students. The result of the review process was a sharper pedagogical approach towards the curriculum. Wilma felt that she gained some substantial skills by accepting the constructive and critical feedback of a colleague. She also felt she had, "nothing to fear about the peer coaching, related to contractual status."

When asked about alternative pay structures, Wilma shared that she is concerned about the subtext of the alternative pay plans that are attached to student performance. Wilma stated: "you have to look at what is between the lines." Wilma believes the message to teachers from certain stakeholders is that "[teachers] are not doing [their] job" - as Wilma states, why else would "taxpayers need to offer an incentive?" Wilma believed this message is deleterious to the morale of the profession.

Wilma also brought up a unique point. Wilma believed that there are far more subversive undertones with the issues related to alternative pay structures: the public hears about "how little teachers make" so, "let's make 'em work for a pay-raise." In other words, there are certain groups of policy makers that will not support any kind of salary structure changes within the field of teaching until teachers have "proven" their results.

Additionally, Wilma pointed out the fact that it would be unfair for standardized achievement to be a determining factor in teacher pay. Essentially, there are multiple groups of teachers that do not utilize a standardized model to assess student progress (e.g. music teachers, librarians, foreign language teachers, etc…). Wilma pointed out, "what am I supposed to do, give the 'standardized' test of music knowledge' to determine if my students have learned?"

However, Wilma did see the benefit of alternative plans that can compensate educators for higher levels of performance. For instance, Wilma pointed out that if it were not for several extra-duty stipends, she would not be able to stay in the position that she currently occupies. The extra duty work allows her to be adequately compensated for additional professional commitments. As a means to pay teachers, she believed it is a powerful way to reward teachers for going beyond the call of duty.

Wilma had little to say about bargaining and did not want to answer any questions related to bargaining because she said she "really has never been involved in the bargaining process and would feel uncomfortable responding."

In all, Wilma thought the Union could continue to assist in making schools a better place for both students and teachers. If the Union "assists the teachers, the teachers can help the kids."

Cross Case Comparisons

In order to assist readers and further develop the qualitative component of this research study, a cross case comparison was employed. This provides readers with a visual tool to assist in analyzing the results of the above interviews. The methods for this cross-case comparison are borrowed from Gall, Gall and Borg (2007). Essentially, in this cross-case comparison, pre-determined themes were extracted from the interviews. Table 4.25 and 4.26 summarizes the findings.

The cross case comparison reveals unified findings from the respondents. However, it shows the reasons behind the interviewee conclusions all vary. In many ways, this speaks to the complexity of the topic and the need for further understanding of individual beliefs related to the topic of labor reforms in K12 systems.

Table 4.25: Cross Case Analysis related to Compensation

	Jane	Jim	Kathy	Wilma
Teacher Pay for Student Performance	**Not endorsed**; viewed as an unfair way to regulate teacher salary levels	**Not endorsed**; viewed as too subjective. Students contribute towards the learning outcomes equally.	**Not endorsed**; revisions are necessary yet need to be determined in a fair manner.	**Not endorsed**; sends a message that teachers are not completing the requirements of their position.
Alternative Salary Structures such as extra duty compensation, etc…	**Endorsed**; Alternative Salary Structures related to difficult teaching assignments was viewed favorably.	**Endorsed**; Issues related to younger teachers accepting teaching jobs with lack of earning potential was discussed.	**Endorsed**; Teachers having opportunities to earn higher salaries was viewed favorably when it contributed some kind of benefit to the school.	**Endorsed**; Viewed as vital to helping teachers meet added work place demands such as extra-curricular assignments, etc…

Table 4.26: Cross Case Comparison related to Bargaining and Peer Review

	Jane	**Jim**	**Kathy**	**Wilma**
Collaborative Bargaining Processes	**Endorsed**; However, bargaining should be about work place issues not necessarily curricular issues.	**Endorsed**; However, curricular issues should be left to instructional teams and teachers.	**Endorsed**; Bargaining should meet the needs of the district and the teachers. The collaborative process facilitates the process.	**N-A**
Peer Review for Professional Development	**Endorsed**: Peer review could facilitate teacher growth, it should not be viewed as evaluative	**Endorsed**; Would help facilitate teacher growth in the pedagogical process	**Endorsed**; Professional Development purposes only. A mentor program for induction was identified as beneficial.	**Endorsed**; Shared a personal experience related to the power of a peer review process
Peer Review for Contract Renewal	**Not Endorsed**; Peer review for contract purposes may lead to a negative work environment.	**Not Endorsed**; Peer review would be too politically loaded for a building to handle. Contract renewal best left to the principal.	**Not Endorsed**; Contract renewal is an administrative decision.	**Not endorsed**; Peer review needs to be a confidential process and not include administrative decision makers.

Qualitative Conclusion & Summary

It would appear that all teachers in the study recognized the need for Unionization at some level. Moreover, three of the four teachers brought up the idea that respondent Jane termed "trickle down." That is, an adequately taken care of teacher labor force is more capable of taking care of the learning needs of students. Table 4.25 illustrates the cross case analysis and demonstrates that teachers are deeply concerned about maintaining a fair compensation strategy. Additionally, all of the respondents found value with peer review for professional development purposes, yet were concerned about peer review related to contractual issues. Three of four respondents believed that it would be useful for educators to pursue collaborative process during labor negotiations. The reasons why varied but a common theme had to do with issues related to a mutually beneficial bargaining process.

All of the qualitative responders were interested in alternative salary structures for either high performing teachers or teachers who were willing to take on extra-duties or work in difficult situations. Interestingly, none of the respondents identified that the unified salary system was entirely adequate. Rather, it would appear, they identified the unified salary structure as merely a starting point. All respondents recognized the value of a compensated teacher work-force.

In all, the qualitative results did not greatly differ from the quantitative results. The qualitative results provided four specific cases of why individuals may or may not find value with particular kinds of labor reforms or Union strategies.

Importantly, they confirmed that teacher beliefs related to Unionization are informed by multiple perspectives. Moreover, the results of the qualitative interviews confirmed that, while beliefs around teacher Unionization may have some underlying themes, the way teachers form beliefs around labor reforms appears to be dynamic.

CHAPTER FIVE

CONCLUSIONS AND DISCUSSIONS

The purpose of this chapter is to provide an overview and discussion of the

study. There are five related objectives: (a) discuss the results related to the three

research questions; (b) discuss implications of the results; (c) discuss limitations of the

research; (d) link the results to previous research and theory; and, (e) make

recommendations for future research.

Overview

The significance of this study lies in the fact that it is one of the first studies to

empirically analyze what educators believe about labor reforms, specifically practices

in New-Unionism. Largely, the paradigm in Union scholarship has been related to

policy analysis, economics, and more recently, whether Unionization contributes

towards standardized achievement. This study changed the dialogue of Union

research by assuming that educators themselves hold valuable information in relation

to the viability and merit of emerging labor practices. Largely, the current paradigms

in Union scholarship were discounted due to the fact that this study assumed teacher

perspectives were valid. Continuing the argument over testing data and the value-

added component of Unionization was largely viewed as futile and non-productive by

this researcher. Moreover, this study was largely a response to the Hess and West

(2007) report that called for reform in the union ranks.

This study adopted survey methods based on the works of two leading survey

researchers, Rea and Parker (2005), who provided step-by-step guides related to

conducting surveys where opinion and attitudes were the objects of understanding.

The adopted methods created a powerful tool for capturing educator beliefs' related to

post-industrial labor reforms across three critical dimensions of Union reform

identified in the literature review: (a) alternative salary structure, (b) collaborative

bargaining practices, and (c) peer review programs.

According to Pole (2007) this study embraced an epistemological perspective

known as a mixed-paradigms approach to answering specific research questions. This

mixed-paradigms approach assumes that there is value and truth in both qualitative

and quantitative ways of understanding social reality. Additionally, the study was

informed by the research works of Gall, Gall and Borg (2007) whose works have

become paramount to many educational research endeavors through extensive

methodological guidance.

The data collection for this study occurred within the State of Oregon in the

spring of 2008. Approximately 10,000 educators were solicited to participate in an

internet survey of educator beliefs related to post-industrial labor reforms, with 8,000

receiving an actual invitation. This survey was housed on an HTML website with an

internet survey provider, SurveyMonkey©. The study also included demographic

controls to understand how subgroups of educators responded differently to survey

items. Moreover the survey asked educators to assess their own knowledge of the

proposed labor reforms. Nearly 800 educators across the State of Oregon responded to study and provided informed consent for participation while a respondent sample size of 652 was needed to generate reliable (and potentially generalizable) results.

Among the survey respondents, four educators across the State gave informed consent to be interviewed by the primary researcher and provided extensive information to develop four cases of teacher beliefs related to Union reforms. These cases identified that Oregon educators have differing perspectives about the teachers' Union, but common ideals were noted. It could be said that the qualitative results indicate that beliefs about the Union are influenced by multiple perspectives. The same level of variability observed at what could be considered the Macro level in the Johnson-Moore et al (2007) study could also be observed in the present study. Only this time, the results were captured at the individual educator level as well as among the entire group of respondents.

The quantitative data were subjected to four kinds of inferential analysis in addition to the basic descriptive measures found in Appendix A and Appendix B: (a) factor analysis, (b) hierarchical cluster analysis, (c) MANOVA analysis and multiple regression analysis, and (d) correlation analysis coupled with regression curve estimates. Thus, the data painted an interesting picture of what educators believe about labor reforms, and identified possible sub-group differences between responders. A discussion of the results follows.

Results

While this study makes no claims to explain absolutely the underlying beliefs of Oregon educator perceptions related to post industrial labor reforms, it does contribute towards understanding what Oregon educators believe about specific labor reforms that are occurring across the country. As mentioned before, this study is believed to have generated the largest independent dataset of teacher beliefs related to post-industrial labor reforms in the country, within the context of the Oregon school system.

Finding #1: Question #1 – To what extent do Oregon educators find merit with alternative salary structures?

It would appear that Oregon educators view alternative salary structures in a favorable light. Largely, the results of the study concluded that Oregon educators find merit with salary plans that deviate from the traditional single schedule model (years of service and education) which is utilized to determine educator salary. However, there is one point of clarification: the majority of educators did not find merit with salary structures that are tied to standardized achievement results (items one, three, four, and five). Simply put, educators did not demonstrate an interest in having their salaries tied to student achievement. In fact, the questions that linked student achievement to salary advancement created an entirely separate cluster combination, which will be discussed below. When asked whether educators should be compensated for increases in achievement, the majority of Oregon educators disagreed.

The majority of teachers did however affirm an interest in allowing younger teachers to advance the salary schedule at a faster rate (see Appendix A). The participants were also supportive of their own salaries being tied to work accomplishments or extra-duty initiatives. However, it is important to interpret this finding in light of the fact that over 60 percent of sampled educators believed the traditional salary system is adequate (again see Appendix B). This suggests that teachers are not uncomfortable or dissatisfied with the current single system salary schedules; however, salary enhancement opportunities remain appealing to Oregon educators.

It is interesting to interpret these results in light of the HCA analysis that was conducted in Chapter Four. The HCA revealed clustered items. These clustered items indicated how certain items mediated other items to form groups of items. By analyzing how one item interacts with other items to create a cluster of items, items on an instrument can be clustered and reduced to themes.

Within the alternative salary structure model, all of the items related to student performance as a basis for pay created a singular cluster of responses (Items 3, 5, 4 and 1). On all of these items, teachers responded strongly in the disagree category, which suggests that teachers do not find merit with compensation programs linked to student achievement. Additionally, this group of items had the highest reliability estimate of the entire survey. The significance of this finding is related to the measurement conclusion that educators viewed these questions as "discrete" from other questions. In other words, these items did not predict or mediate any other

responses. This indicates linking salary to student achievement, in the State of Oregon, is largely viewed as a separate issue from other forms of salary enhancement.

A second cluster of items developed, which was related to salary being tied to teacher accomplishments (Items 6, 7 and 8). As reported in Chapter Four, educators appear split on this cluster of items. The score needed to suggest agreement with this item was scaled at 8 points. The analysis revealed that respondents affirmed this cluster at 7.96 points. This indicates that agreement was not reached within the sample related to this cluster. Or put another way, this demonstrates that Oregon educators are somewhat split on whether or not teacher accomplishments should be utilized as a basis for pay.

Finally, a third cluster of items were classified (Items 10, 11, 9 and 2). These items were related to how teachers could be paid in more general terms and included the items related to teacher compensation based on extra assignments, graduate education level, high performing assistance to the building, and a single structure schedule. This final classification of items could largely be described as the current system under which teachers are compensated. Teachers responded in the affirmative to these items which suggested that teachers across the State are interested in additional compensation schemes in addition to their current salary plans.

It was very interesting that the items related to traditional salary structures and graduate education levels also became classified in the third group. Since this cluster of items was affirmed, this suggests that teachers view these as viable strategies for compensation programs – and there is a unified belief that teachers should have opportunities to earn more in addition to the current salary structure. Teachers as a

whole embraced the idea that a singular salary schedule (based on years of experience and education levels) was an appropriate vehicle for teacher pay. Additionally, respondents embraced the idea that there are other good ways to reward high performing teachers beyond the pay-for-achievement initiatives that are occurring across the country as described by Koppich (2005).

Qualitative responders also affirmed this finding. All four interviewees were deeply opposed to changing the salary systems in Oregon - if those changes resulted in student performance being utilized to assign salary levels. While all four educators had different reasons for ending up at that conclusion, they all expressed the belief that wages being tied to achievement was not a fair or reasonable labor practice. Largely, these findings were also confirmed in the quantitative dataset. Less than five percent of teachers were in favor of linking standardized performance on tests to teacher salaries (see Appendix B).

However, all four interviewees believed that alternative salary structures were very viable and important for sustaining the teaching profession. They all expressed the strong belief that teachers should be in control of meeting the requirements for wage increases. Student performance was viewed as a subjective indicator of actual teaching accomplishments. This presents a different finding from the Koppich (2005) research, which is discussed in a later section.

In summary, it would appear that teachers were not supportive of alternative salary plans that linked teacher compensation to student performance. Rather, teachers expect objective and fair ways of determining salary levels.

Finding #2: Question #2 – To what extent do Oregon educators find merit with collaborative, or interest based bargaining strategies?

Oregon educators demonstrated a high level of agreement with several of the propositions of interest based or collaborative bargaining. The Hierarchical Cluster Analysis (HCA) of the data revealed that there were three themes captured in the survey, beyond just the industrial versus post-industrial mind-set around which the survey was designed.

Cluster number 1 (Items 9, 10, 1, 6, 3 and 5) was related to teachers' beliefs around what the Union could be doing to establish a collaborative approach. In general, these items dealt with establishing common goals, utilizing shared governance models, and the Union leading the way on policy issues. Largely, teachers affirmed the entire cluster of questions. In fact, on this series of items, respondents were 4.7 points beyond the required cut score, on average, suggesting strong agreement.

Cluster number 2 (Items 7, 12, 13, 4 and 8) was related to building level control, the flexibility of bargaining agreements (district versus building-level), and the power of the Union. As a whole, teachers affirmed these items in the direction of a collaborative process. Again, the obtained average was nearly two points above the cut score needed to demonstrate majority agreement with the cluster of items.

Cluster number 3 was perhaps the most interesting (Items 2 and 11). This cluster dealt directly with teacher militancy as a labor practice and bargaining for economic purposes exclusively; at some level these items interacted with each other, in the sense that they were mediated by one another. Based on identified response

patterns in the HCA analysis, beliefs about militancy and bargaining as a tool for economic issues were approached as related items on the instrument, separate from the other clusters. To put another way, these items did not have any direct relationship to other items on the survey but corresponded only with each other.

Respondents did not affirm this cluster of items. As a cluster, this item missed its cut-point by 2.5 points on average suggesting that Oregon educators do not affirm the ideals associated with industrial labor mentality that utilizes militant strategies or only bargains for economic necessities. If study findings are representative of the State of Oregon, this a telling finding related to the nature of educators and their wishes for a labor organization.

With these findings in mind, it is important to ask three questions directly related to the state of teacher Unionization in Oregon: (a) is Oregon already post-industrial in mind-set for the purposes of collaborative bargaining? (b) Is Oregon moving towards a post-industrial mind-set related to bargaining? Or, (c) was Oregon initially post-industrial from the beginning? To a large extent, the answer is probably yes to all three scenarios. Thus, sorting out which scenario best fits (an Oregon K-12 mentality or a national labor movement that looks like a particular labor mentality in the State of Oregon) is cumbersome and difficult at best.

According to labor theorists (Kerchner, Koppich, & Werres, 1997; Koppich 2006) post-industrial labor strategies around bargaining are a national movement driven largely by a need to improve schools through bargaining processes with labor Unions. Largely, it would appear that Oregon has already endorsed a mentality that fits this emerging national trend, if the survey results are representative. However,

this endorsement has not found its way to the State Capitol in the form of legislation or policy.

What has been codified in the State of Oregon is a fairly industrial labor mentality through public policy (as an example see PECBA, 2007 which was described in the context section). Through statute, Oregon educators are bound to labor guidelines which clearly delineate a management and non-management organizational scheme. This form of policy is diametrically opposed to what was affirmed in the survey at the cluster level and item level (see Appendix B and Chapter Four). These forms of organizational strategies have been targeted by New-Unionists as counter to the mission and purpose of public education.

As has been identified in the literature review, one of the entire points of the collaborative bargaining process is to establish school level (local) control over the management of school systems through codified bargaining agreements. Themes of local control, local accountability, and local funding are top priorities for many school systems (as an example of this see the website of Oregon School Boards Association, particularly the opinion pieces, legislative agendas, and resolutions) and thoroughly reflect the culture of Oregon school governance. Thus, the interaction between the culture of Oregon schools and the survey outcomes is important to consider. Put another way, the teacher affirmation of local control in the survey may be a truer reflection of Oregon ideals related to the management of schools, rather than an ideal associated with a larger national labor movement.

The qualitative findings elaborate these issues. Most teachers have never participated in bargaining processes. This was affirmed in the sample of interviewees.

Only one of the interviewees had participated in the bargaining process. However, the interviewees who answered questions about bargaining expressed dissatisfaction with the bargaining process tackling learning issues. Any policy issue was up for negotiation. However, qualitative responders were not interested in teaching and learning issues being brought to the bargaining table. Based on the qualitative interviews, we can assume that teachers do not see the direct connection between policy and issues related to curriculum, instruction and assessment.

This is further elaborated. There was a pervasive belief that decisions about learning issues were not appropriate to be bargained. As one respondent stated, "teachers are professionals, they should be trusted make decisions about learning." And, as another respondent stated, "not everyone has good judgment about curriculum, it is better for curriculum committees to make decisions about curriculum issues." This confirmed the survey data where the majority of educators were in favor of bargaining policy issues; but, educators were less comfortable bargaining issues related to curriculum needs. It should be noted that many of the ideals of Kerchner, Koppich, and Werres (1997) were embraced by educators – stopping short at bargaining for instructional issues. This is discussed in the following section.

In summary, it would appear that teachers endorse the tenants of collaborative bargaining processes. The qualitative data suggests that teachers may not be comfortable with bargaining issues related to instruction and curriculum. Thus, further research to define a collaborative process is warranted.

Finding #3: Question #3 – To what extent to Oregon do educators find merit with peer review programs?

It would appear that Oregon educators have some conflicting ideas about the value of peer review and the way that it should be utilized. As a whole, individuals responded in a way that would suggest peer review would be appropriate for professional development purposes. However, for contract renewal purposes, educators were less inclined to find value with peer review. This theme was also affirmed in the qualitative data.

According to the survey data, educators largely felt that the Union should become more proactive in quality control issues. However, teachers responded to the survey in a way that would suggest that individual teachers are not responsible for the quality control of their peers. In other words, the Union should play a role in teacher quality control; but, teachers themselves were uncomfortable assuming responsibility for quality control (see Appendix A and B). Interestingly, the majority of respondents did not believe that peer review programs would solve problems with low performing teachers. This sentiment was echoed in the qualitative data-set as well.

Again, the HCA allowed groups of items to be considered. The first peer review cluster (Items 5, 9, 12, 11 and 1) was related to professional development and other benefits of peer review. Largely, teachers identified that peer review and professional development go hand-in-hand. Additionally, it was identified that new teachers and inadequately performing senior teachers would benefit from a peer review component. This theme was affirmed in the qualitative data-set as well.

The second cluster of items (Items 4, 8, 3 and 1) were related to teachers being responsible for quality control of their peers and whether or not peer review would actually produce a positive outcome. Oregon educators did not respond in the affirmative. Rather, respondents were split on this issue. Half of the scores were above the cut-point while half were below the cut-point. As discovered in the qualitative results (and noted above) Oregon educators found that quality control was better left to administrators with Union input. While there was more agreement for utilizing a panel for contract renewals (Item 3) many did not identify merit with this labor strategy to resolve quality control issues in the classroom.

The third cluster (Items 2, 6, 10 and 7) were directly related to who (or what mechanism) should be determining contract renewals. Largely, this cluster of items represented the industrial labor mentality that the survey was designed around. As was noted, as preference for clusters number one and two increased, preference for cluster number three decreased. This indicates that there is divergence related to whether or not peers should be responsible for their colleagues in the K-12 employment sector.

It should also be pointed out that this cluster of items was a "loose" cluster. In other words, none of the items formed strong relationships with each other. Thus, the results are interpreted with caution, especially in light of the low Cronbach's coefficient. It comes as no surprise that teachers were split on a non-teacher driven evaluation process. This meant that the current system of review is viewed as appropriate for a large number of responders.

This was also a finding in the qualitative data. Peer review was viewed favorably by the qualitative respondents, when peer review was not attached to any kind of contract renewal. Qualitative responders believed that teachers should not be evaluating each other; that is a job best left for administration. Responders recognized the value of having a colleague give systematic feedback. In fact, two respondents believed that peer review and coaching was an incredibly powerful tool for expanding pedagogical skills. Yet, the power of the peer review was that it was a confidential process designed to support the teacher, not evaluate the teacher. According to these teachers, an administrator should never receive the results of the peer review.

The interviewee who was the most in favor of modifying the current administrative review process believed that peer review could be highly effective if a master-teacher was designated to review teachers; but, that master teacher could not be attached to the "building politics" at any level. The teacher evaluating other teachers would have to be a completely objective and impartial individual.

All qualitative responders were concerned about teachers evaluating each other in the same building. One interviewee even considered the fact that this could fundamentally change the culture of K-12 for the worse. This particular respondent felt that peer reviews, for employment purposes, conducted by teachers in the same building would lead to a "demoralizing" work culture where individuals would not be able to develop collegial trust. This was affirmed in the quantitative data where teachers were less likely to affirm that peer review programs would resolve issues with low performing teachers.

Interestingly, the present dataset supports a peer review process that has been identified by Vacilotto and Cummings (2007). In this particular review process, teachers are provided opportunities for systematic feedback of their teaching strategies, methods, and materials through peer facilitated observations and coaching. In this manner, educators are not evaluated for contract renewal based on peer feedback. Rather, they are simply given opportunities to facilitate each others' growth through what Vacilotto and Cummings deem a structured, reflective, developmental process. While this process can deliver what could be thought of as critical feedback on an individual's teaching performance and highlight areas of improvement, it does not impact future employment. This process is confidential and designed to help facilitate the pedagogical development of teachers. Thus, it matches Oregon educator responses in the area of professional development.

In summary, teachers were not inclined to find value with peer review for contract renewal purposes. Rather, teachers were only interested in peer review for professional development purposes. As a matter of conjecture, it is highly possible that teachers are only interested in implementing peer review to the extent that educators find it will enhance practice.

Finding #4

Demographic influences on data were noted in Chapter Four. They will be discussed more thoroughly in this section.

Gender

Gender was found to account for some differences in standardized scale scores. However, the Wilks-Lambda scores demonstrated that, as a predictive variable, gender was not that important. Essentially, the Wilks-Lambda statistic is a measure of how much variance can be attributed to one or more random effects within a distribution of a dependant variable. A summary of the findings concludes: (a) males were more likely to endorse achievement as a basis of pay; (b) less likely to embrace the ideals of collaborative bargaining, (c) more likely to endorse the second cluster of items in peer review largely described by the benefits of peer review, and (d) less likely to endorse the third cluster of items in peer review related to the industrial mentality of peer review.

What is important to note in this finding is that none of the differences even approached a half of a standard deviation. Thus, confirming that there were highly statistically significant differences due to gender is difficult. It is likely that somehow gender is at play in the data-set. However, it is easy to also discount the role of this predictive variable, especially considering the Wilks-Lambda estimates. Exploring gender differences is recommended for further investigation in future studies. This will not be discussed further in this study due to the ambiguity in the analysis.

Union Differences

It comes as no surprise that individuals who have not chosen to join a Union may hold different beliefs about the Union and those different beliefs may impact views related to labor reform. As was discussed in the context section, Oregon is a

fair-share State. This means that all teachers pay a due to the Union whether or not they join the association, with few exceptions. Unfortunately, there are no published studies that shed light on why an individual may choose to join a teachers' Union -- or how many teachers chose to be fair-share members versus regular members. Thus we can look at how response patterns differed but have no previous theoretical framework to hang the results or to interpret the issue around fair-share.

In the current study, four clusters were impacted by Union membership. First, Non-Union members were more likely to endorse alternative salary cluster number 1, which was related to paying teachers for increases in student achievement. In fact, this difference was over ¾ of a standard deviation. When this difference is rescaled to the non-standardized value it represents an average gain of nearly 2 points. This possibly suggests that non-Union members are more supportive of paying teachers based on student achievement gains compared to their Union counterparts.

Additionally, non-Union responders were more likely to endorse alternative salary cluster number two. This indicates that there are significant differences between how non-Union teachers and Union teachers view issues around teacher pay. Additionally, it points to a potential finding that not all teachers agree with the current salary systems. Certainly, there were many educators who found the salary structures inadequate.

Given the discovered divergence, it is highly unlikely that Oregon would adopt a unified salary system like the one that is utilized in nearby Washington State. This sub-group analysis reveals that beliefs around teacher-pay are not homogenous and that certain groups extensively favor alternative salary programs. Tangentially, this

potential finding is also confirmed by the number of respondents who affirmed local

control in the collaborative bargaining items. One theme from the data set, discussed

above, is certainly related to local control versus more levels of aggregated regulation.

In particular, this was affirmed in the clusters related to bargaining.

Two more differences were found related to non-Union members, both are

related. Non-Union members were less likely to endorse the ideals of collaborative

bargaining (bargaining cluster number 1) and were more likely to believe that the

bargaining process could be used to enhance public education (bargaining cluster 2).

This presents an interesting scenario which, again, may point to why individuals do

not join a teachers' Union. As a point of discussion, it would appear that non-Union

members may not believe the Union is actively pursuing the correct agenda related to

public education through the bargaining process. Non-Union members may reject the

premise that Unions should utilize their collective power, yet realize that such an

outcome could be beneficial. This is somewhat of a paradoxical finding.

As a side note, non-Union responders were more likely than Union members to

state that the Union should bargain for economic necessities only (see Appendix B).

This is interesting because there were no significant differences at the cluster level.

This was discovered through a simple means comparison. A potential reason for this

is presented here.

When juxtaposed to one of the themes from the qualitative data, it can be

observed that the Union may marginalize certain educators who are not interested in

the political agenda of the teachers' Union (see Jim's interview and below discussion).

Thus, one interesting finding may be related to the fact that individuals do not join the

Union because of a perceived non-labor agenda (i.e., a political agenda on the part of the Union). To elaborate, the teachers' Union takes a highly active role in state and national politics. Individuals who disagree with the political agenda of the Union may be more likely to wish the Union would just focus on the "bread and butter" issues of economic needs.

Non-Union members were also more likely to find value in the peer review process at the item level (see Appendix B). Four questions demonstrated noticeable differences. This suggests that within the labor ranks, many teachers are comfortable with the traditional administrative review process. To some extent, more comfort with the traditional review is mediated by a Union membership. This potentially indicates teachers outside of the labor Union may become more comfortable with professional development review processes that included peers.

In summary, Union membership only had minor predictive validity. However, differences were noted. Particularly, differences were noted in the area of salary structure and bargaining. Thus, it is possible that non-Union members may desire a different approach towards salary and bargaining than their Union peers. This, of course, would be a useful topic for further research.

Experience Differences

One subtest noted a difference related to years of experience, which may also be related to the age issues discussed below. Since the variable of years of experience was not normally distributed, it is difficult to estimate whether the coefficient is

accurate and whether the probability value is correct. Thus, the results of that analysis are interpreted with skepticism.

Largely, it would appear that agreement with bargaining cluster number three (militancy and bargaining for economic purposes) decreases with age. However, since the study is not following the same group of teachers over time, it is difficult to determine whether that is attributed to more years of experience or to an age-cohort effect. Thus, without a longitudinal view of the data, tracking one group over time, it is difficult to estimate how the variable of teaching experience actually influences beliefs around militancy and bargaining for economic purposes.

Age Differences

Differences on subtests in teacher age were also observed. Certainly, teachers may have different ideals when they first begin teaching and become complacent as they progress through a K12 teaching career. And, younger teachers may enter the profession feeling as if they have power to change the system and impact learners. Moreover, teachers may become less empowered as they begin the process of working in the K12 system and discover they have less ability to influence a bureaucracy. This change in empowerment may help explain the findings. However, there are probably issues related to "generational culture" also at play in the data set.

With the rise of what has been termed, generational culture we can further consider that age may mediate beliefs about specific labor reforms within the K-12 setting. Examining these kinds of generational cohort effects is not a new endeavor.

The theories related to generational cohort effects are traced to a German-Jewish sociologist, Mannheim, who was affiliated with the Frankfurt School. Based on Mannheim's broader sociological works, the theory of "generations" was set into the realm of the social sciences. While Mannheim did not discretely define generations, he laid the social foundation for understanding that social systems are impacted by generational influences based on placement in a generational continuum (Eyerinan & Turner, 1998).

According to Sessa et al (2007) there are key differences in how generational cohort effects mediate work processes. Largely, the theories explained by Sessa et al, have significance for understanding why the data set demonstrated different response patterns across age groups. (Additionally, generational differences were discussed in the qualitative results with respondent Jim).

According to Sessa et al (2007) there are key differences between those who fall in the 20-30 range compared to their older peers and vice-versa. Essentially, generations have a different culture related to workplace norms, conditions, cultures, and employer/employee expectations. As the comprehensive Sessa et al report indicated, this is a pervasive issue in multiple labor-management paradigms. Many of these differences can be attributed to beliefs about leadership within workplace settings. It is theorized that these differences are rooted in social conditions that influenced the development of different generational periods.

Based on the works of Sessa et al, (2007) it is probable that these generational differences may contribute towards whether a teacher finds merit with a particular change initiative because the change initiative may be driven by a leadership process.

Since the survey data was comprised of multiple age groups, it is likely that some of these theorized factors are at play with Oregon educators in the current data set.

Essentially, Sessa et al (2007) demonstrated that views of leadership, perceptions of leaders, and leadership behaviors were different between the generations. Applying the Sessa et al research to the current data-set, we can see that younger teachers may be less likely to embrace or adopt the Union strategies that were developed by their predecessor generations due to the fact that the Union acts in a leadership capacity, which has been largely confirmed in the literature related to teacher Unions (Kerr-Jessup, 1985). The leadership role that the Union plays in the K-12 structure may be viewed differently by younger teachers. Or, conversely, younger teachers react differently to the Union and its influence.

However, there is also evidence that the effects of generational culture go beyond just the workplace scenario. In fact, the observed results discussed above may be more related to a "life issue" rather than a "work-issue." Sessa et al, prior to elaborating on the work-place implications, provided an extensive literature review in the area of generational cohort differences from a theoretical perspective. While this dissertation does not seek to explain the entire underpinnings of recent scholarly work into generational issues, it certainly does note that generational influences go beyond work place settings as described by Sessa et al (2007). The root of the workplace generational issue might be traced to the underlying culture and social issues surrounding age.

A summary of age impacts follows. Whether any of the above generational cohort-effects mediated responses is largely a matter of conjecture. However, the

specific influence of age, as captured in the survey results, is reported here. (a) Educators in the 60+ age category were more likely to want to link achievement to earning opportunities (cluster number 1 of the alternative salary schedule). (b) The second cluster of the alternative salary items is also influenced by the age category. In particular, teachers in the age range of 50-60 are less likely to affirm the cluster compared to other groups. This cluster could be described as a cluster that was closely related to linking teacher accomplishments to pay, but did not include linking student achievement to salary. (c) The second cluster of bargaining is influenced by the age category. Again, we see 50-60 year old teachers less likely to affirm this cluster compared to other groups. This suggests teachers in this age range are not as optimistic about the potential outcomes of bargaining. This cluster was conceptualized by its combination of items that suggested bargaining could be used as a tool to enhance public education. Finally, (d) the third cluster of the bargaining category is influenced by the age. In this category we see 40-50 year old teachers particularly more different than their 20-30 year old counterparts. Largely, older educators do not affirm the cluster of items related to economics and militancy at the same level as other groups, particularly younger teachers in the 20-30 age range.

If readers are further interested in extrapolating how age my impact these specific survey results, the comprehensive analysis and literature review by Sessa et al (2007) will be invaluable. Additionally, it should be pointed out that the Wilks Lambda score for the effects of age on the distribution of responses concludes that age only explains a small percentage of the overall variance across clusters. Thus, reading too much into the age difference may not be a warranted activity. Finally, with

another caution related to over-interpreting the results from age, readers should

consider that the sample sizes from the age bands are small and vary greatly (see

Appendix A for the breakdown).

Geographic Differences

Finally, the last category of geography is important to address. Largely, the

models confirmed there were some large differences between Portland-metro and two

other groups: East-of-the-Cascades and the Coast. The results demonstrate that

Portland responders were less likely to affirm the principles of collaborative practices

as measured by the second cluster of items related to collaborative process; while on

the other hand, the geographic region of the Coast and East-of-the-Cascades were the

most likely to affirm those practices. This analysis is not surprising considering the

fact that many urban areas were the first to utilize what could be considered more

militant labor strategies (Murphy, 1990; Urban, 2000). This raises several discussion

points.

We can consider the fact that Portland-metro responders may be influenced by

urbanization, to some extent. Certainly urban schools have come to the center of

attention in recent years as school reform initiatives have targeted apparently low

performing urban school systems within inner-cities (Chu-Clewell, Campbell, &

Perlman, 2007). However, not all Portland-metro responders could be considered

"urban." Thus, the literature related to urban school issues is not useful to explore in

this discussion. To illustrate this point, consider Forest Grove Schools, Canby

Schools, Lake Oswego Schools, etc… which are what many would consider suburban

school systems. These school systems are not necessarily the first school districts one thinks of when considering urbanized school systems. Additionally, it would be a stretch to classify the Bend school system as rural, and a large number of respondents from the East-of-the-Cascades responders were from that school system.

Thus, it is likely that the effects of being in a large metropolitan area have some influence on educator beliefs around certain labor reforms independent of whether or not the educator is in an "urban" teaching environment. To examine this issue further, it is useful to consider the works of Latham (2003). Latham, an academic who studies the field of urbanization, published an interesting summary of the economic and political environments of urban landscapes. A brief discussion is warranted.

While Latham is a New Zealand scholar, the issues of urbanization can be identified in nearly all industrialized nations. Moreover, locating a comparable, comprehensive assessment of the unique economic and political landscape of urban life in American research has been difficult. Thus, the Latham summary becomes particularly useful and succinct for capturing how urbanization may influence response patterns related to economic issues (salary and benefits) and employment process.

Latham proposed there are five unique, emerging features of urban environments. These five theoretical features may help frame the results of the present survey: (a) large city areas are becoming increasingly polarized by wealth and income, (b) cities are becoming increasingly shaped by social exclusion versus inclusion, (c) cities are increasingly consumptive, meaning they utilize more resources

in a non-sustainable way, (d) cities are increasingly recognized as sites of difference, and, (e) cities are far more globalized than they have been in previous generations. These five factors, in combination with each other, create a unique metropolitan environment where differences in socio-economic status, privilege, and class are exacerbated. Thus a simple ethological perspective explains that metro-educators may feel the need to advocate for their own positions to a greater degree than other geographic locations.

Based on the Latham model we can theorize that Portland-metro responders may be responding to this survey in a way that is more a product of the unique economic and political landscape of urban daily life. The exact extent to which that landscape influenced the survey results will probably not be understood without further research. But, we can conclude that Portland-metro responders were less likely to embrace collaborative labor strategies. This can be potentially understood through the features of Latham's work.

As a matter of conjecture, however, it is easy to speculate that small, rural schools may be required to act in a more collaborative fashion. Thus, the results framed to a geographic model are a potentially inaccurate finding. Readers should consider the fact that a small school in a remote area may need to have a more collaborative approach towards solving problems than larger schools in larger systems with more resources for program and staff. Thus, the effects of urbanization may be difficult to sort out in the present data set.

Implications of the Study

Given the research of Johnson-Moore et al (2007) the implications of this study are potentially significant, yet cautiously endorsed. Since current K-12 labor theories recognize the fact that labor reforms are unlikely to occur without the support of the K-12 teaching constituents, we can begin to assess which labor reforms are more likely to occur across the state of Oregon. This study has implications on several levels.

Implication #1

It would appear that many Oregon educators are interested in adopting alternative salary structures to the extent that those salary structures are not mediated by student achievement indicators. As mentioned above, this would probably preclude a statewide salary system as implemented in locales such as Washington. While teachers demonstrated satisfaction with the current single salary model, the majority also expressed comfort with the following: (a) teacher accomplishments (such as national board certification) driving teacher pay; (b) teacher work tasks (such as projects or assignments) driving teacher pay; and (c) paying newer teachers higher wages. The only area that failed majority consensus was related to student achievement driving teacher salaries. Largely teachers rejected the idea that they should be compensated for increases in achievement.

While the benefits of alternative compensation programs are being promoted across the country, the fact remains that teachers have utilized extensive labor organization practices to develop what is largely considered a fair salary model (e.g., consider the fact that approximately 60 percent of educators endorsed the traditional model as adequate in the present study, see Appendix B). Thus, teachers may be unwilling to make changes to their salary schedules if it requires a reform that is considered "unfair." This study suggests that, given the current landscape in Oregon, a Union-sponsored initiative to increase educator salary, based on student performance, is unlikely.

Another important contextual consideration is related to the recent Sizemore initiative which has recently been placed on the Oregon Ballot (Initiative 20, 2008). This proposal would mandate teacher compensation plans be driven by student achievement results instead of years of experience and education, which is the largely held model for determining educator salary. It is important to point out that Oregon educators, based on the current results of this study, would be opposed to such an endeavor. As was indicated in the qualitative results, many educators view achievement results as subjective.

As a tangential consideration, it is interesting to conjecture that this could also be out of a deeper commitment to the social issues related to the field of teaching and learning. To some extent placing a dollar figure on the learning of any student in a K-12 classroom may be offensive to those who have dedicated their lives to the profession of teaching. Common sense may suggest that teachers do not want to put a dollar premium on learning. In some ways, teachers may be offended that a price-tag

can be placed on the learning outcome of a child. This, of course, is just one possible explanation for the deep opposition that was demonstrated in the survey results related to student achievement as a basis for educator pay.

Interestingly, the Chalkboard Project in Oregon has recently begun experimenting with alternative salary structures for teachers with the implementation of the Creative Leadership Achieves Success project (CLASS). In the CLASS project, teachers are given opportunities to advance the salary schedule faster and are given other opportunities to increase professional compensation through sustained professional development, ongoing performance reviews, and teacher-leadership training. While the experiment is on-going, and the results not-finalized, it would appear that Oregon may be ready for this kind of experimentation or pilot. Importantly, redefining salary schedules for educators is only one component of reforms associated with the CLASS project (CLASS, 2008).

Largely, ideals associated with the CLASS project were affirmed in the present study, particularly related to local control, teacher professional development, and opportunities to increase earnings based on high teaching performance. As a side note, three school districts in the State are experimenting with the ideals associated with alternative salary structures. Thus, the implication coincided with the finding that the ideals expressed in the survey are already in-place as matters of labor policy in certain locales across the State - while policy initiatives that directly link teacher compensation to test-scores are likely to be met with fierce opposition.

Implication #2

It would appear that Oregon educators responded positively towards the ideals of collaborative bargaining processes. Over 80 percent of sampled educators believed that teacher Unions must identify common goals and beliefs in partnership with school boards and administration (see the item analysis in Appendix B). This suggests that teachers identify with the common values of New-Unionism related to bargaining process (Kerchner, Koppich, & Werres 1997).

Thus, this finding pointed to one of the questions left unanswered in the context section of the literature review: To what extent does Oregon engage in collaborative bargaining processes? Largely, researchers may never know to what extent any given teacher Union system engages in collaborative bargaining practices. However, what is now known is that approximately 80 percent of educators across the State find value with the ideals associated with that reform, assuming this study is representative (see the items in Appendix B). It could be suggested that Union leaders and district officials interested in adopting collaborative bargaining processes would likely find support amongst the teaching ranks for collaborative processes in the area of bargaining.

As mentioned previously, this also speaks to the need to examine State policy related to management versus non-management employment paradigms in Oregon schools. With such a large number of Oregon educators endorsing a progressive model of bargaining, it may not be useful to have policy that does not match the current labor mind-set. As an area for follow-up research, more information from school administrators responsible for human resource issues is warranted. While

teachers (non-management) may endorse the collaborative approach that reduces the barriers between management and non-management employees, it would be interesting to compare the views of teachers with those of school administrators.

As was discussed in the context section of Chapter Two and above, the extent to which Oregon engages in collaborative processes was not known. As was highlighted in the results, teachers largely affirmed the ideals of collaborative bargaining. As such, the new question became which came first: the ideals of Oregon educators or collaborative bargaining ideology? As was discussed in the context section, the present status of bargaining strategies is largely not known in scholarly research due to the large variations in how education professionals conduct their labor organizations. One potential implication from this finding was possibly related to the idea that Oregon educators have already adopted collaborative bargaining ideals.

As a result of this finding one could consider that Oregon educators may not be appropriately placed in the PECBA bargaining guidelines. The K-12 education work-force may need its own set of bargaining guidelines specific for its purposes. If the survey results are representative, it may be useful to consider whether bargaining laws and practices actually match the bargaining mentality of the K-12 system - particularly, as educator ideals related to bargaining seem to demonstrate a desire for a labor policy that is geared for the collaborative processes defined by Kerchner, Koppich, and Werres (1997).

In general, in the case of collaborative bargaining, the K-12 post-industrial labor theory is affirmed within the group of respondents. Based on the survey data, bargaining is beyond economics and militancy (cluster number three) and is about

enhancing the outcomes and process of public education (cluster number two and cluster number one). As noted above, Oregon educators may have already adopted a post-industrial labor mind-set according to the seminal works of Kerchner, Koppich, and Werres (1997), outside of any national labor movement or strategy. Thus, the necessity to re-visit State policy in this area is clearly warranted.

Implication #3

It is evident that a large number of respondents found value with the peer review process for purposes of professional development. Additionally, large numbers of respondents identified with the ideal that the Union should take a more active role in quality control issues related to teachers (64 percent of teachers responded in the affirmative at the item level in Appendix B). Additionally, 58 percent of Oregon educators agreed that a panel of teachers and administrators determining who was offered contract renewals would be a powerful tool for professional growth (see Appendix B).

Labor organizers and school officials interested in adopting peer review programs for professional development would likely find support in the teaching ranks, if the sample is representative and the process stopped short at contract or employment decisions. In particular, teachers aged 20 to 30 may lend more support to a peer review process as they were less likely to affirm the documented negative aspects of a peer review program as measured by the MANOVA analysis in Chapter Four. Thus, we can conclude that, in general, the majority of teachers would endorse a

peer review process that included components of mentoring and support but stopped short at contractual decisions.

This finding was also confirmed in the qualitative data. The qualitative responders identified that peer review could potentially change the way education in K-12 is accomplished and could leave educators with a higher tangible skill set when it came to pedagogical skills (see qualitative responders K and W). However, it would be highly unlikely given the context of the state of Oregon (which includes specific policy limitations on peer review) for Oregon Unionists to adopt a peer review program for purposes of contract renewal, especially when large groups of Oregon educators are opposed to peer-review programs for purposes of contract renewal. It is highly likely that, in Oregon, peer review, coaching, and feedback could become a powerful tool for the professional development imperative described by Kent (2004), as nearly 80 percent of educators agreed that peer review has potential to enhance the educational process (see Appendix B).

Links to Other Related Research: Theory, and Context

This study is the first study to analyze educator beliefs related to New-Unionism from a mixed methods perspective with a heavy focus on quantitative data analysis. As reported earlier, all of the studies to date have been qualitative in nature. Thus a link to the previous research is imperative both for framing these results and answering the larger question of how the results fit within the current scholarly discussion related to Unionization.

As mentioned in the literature, Hess and West (2007) reported that what teachers want in regards to Unionism is not static. Rather, it is a dynamic process. Thus, analyzing what is desired from the teachers' Union is an involved process when considering the extensive variables in involved. Hess and West (2007) illustrated that teachers often voice their opinions related to labor reforms through the Union election process; not necessarily through systematic means to communicate their beliefs. Thus, this research began the endeavor to create research into teacher beliefs related to Union reforms. Instead of analyzing (and inferring) Union election trends, it makes more sense to simply ask teachers to evaluate Union reforms in a representative way. It would appear that Oregon educators affirm a Union that is responsive to district, building, and teacher needs. Thus, Oregon educators expect a dynamic Union capable of responding to what Kerchner, Koppich, and Werres (1997) would describe as critical social changes that are bound to influence the teaching ranks.

In another area, Johnson-Moore et al, (2007) brought up the fact that there are no single unified bargaining systems for teachers across the country: every local chapter of a teachers' Union has some variability. This study confirmed that, in relationship to New-Union practices in Oregon and despite some demographic variability, there appears to be a homogenous group of beliefs amongst Oregon educators related to the reform topics. Put another way, demographic influences were not observed as strongly as hypothesized. For instance, a comparison of mean responses between Title-One and non Title-One responders indicates nearly identical averages across all subtests and items. Also, the gender demographic did not play as

important of a role. It is intriguing, that on several levels, Oregon is more the same than different in the survey response patterns.

This is useful for understanding that, even though some demographics differ, underlying beliefs about proposed labor changes may not differ from one local Union to the next. Thus, the variability that occurs within Unions might not be easily attributed to what could be considered "logical" demographic influences such as Title-One status, or grade levels. The variability between locals, discussed by Johnson-Moore et al, (2007) may be influenced more deeply by inner cultural beliefs/values about labor reforms that are unique to individual school systems. Additionally, in the case of Oregon, this may also be influenced by the deep commitment to local control and governance.

Additionally, Koppich (2006) discussed collaborative bargaining strategies and reform bargaining strategies. The results of this study indicate that Oregon educators are potentially committed to the ideals of collaborative process as described by Koppich. As mentioned above, when asked if teacher Unions should work with schools and districts to identify common goals and values, over 96 percent of educators agreed (appendix B). Further, over 95 percent of sampled educators agreed that the first step in bargaining should be to identify common goals. Based on the work of Koppich (2006), we can see that Oregon is potentially a state level bargaining agent ready to adopt collaborative strategies in the bargaining process.

Koppich (2005) also discussed alternative salary structures in a report on research related to alternative pay plans. Oregon educators are a different group than those who were studied in this seminal study of linking student achievement to merit-

pay. Essentially, a majority group of educators in the 1999 study (reported in 2005) agreed to participate in a pay-for-performance plan. Largely, Oregon educators rejected the premise that student achievement should be a basis for salary determinations. If the sampling is representative of Oregon educators, it would appear that the Koppich study may never be replicable. In fact, comparing the CLASS project to the Koppich study demonstrates that Oregon educators have a distinct take on how to modify traditional salary and advancement systems to promote student achievement. Less than five percent of educators in the present study felt comfortable with their salaries being tied to student achievement; whereas, in the Koppich study, 67 percent of teachers agreed to have student achievement be a factor for supplemental pay (see Appendix B). This is important to note, because the Koppich study would be unlikely to be replicated in the State of Oregon considering the current level of support for merit-pay plans directly linked to student achievement, as indicated by the present survey results.

Continuing the link to previous Union research, peer review programs have been discussed by several researchers (Goldstein & Noguera, 2006; Lieberman, 1998; Lopez & Balzer 1996). What is interesting in the present study is the fact that Oregon educators have affirmed the idea of a peer review program for professional development; yet, that peer review program would not include determinations related to contract renewal be based on peer review outcomes (see Appendix B and Chapter Four Results Tables).

In the original Toledo, Ohio studies related to teacher peer review programs, teachers were found to be more likely to remove poor performing teachers than

administrators (Lopez & Balzer, 1996). That finding may not hold credence in Oregon, where the majority of educators believe a peer review program would not solve problems with low-performing teachers. Thus, one would have to ask, would the same outcome occur? Simply put, peer review has been potentially accepted by Oregon educators for the purposes of professional development only. Based on this survey, contract renewal may very well be viewed differently than professional development activities.

It is important to note that the line between contract renewal and professional development was blurred by Goldstein and Noguera (2006) related to peer review in contract renewal. The present research suggests that line exists very clearly amongst the teaching ranks in Oregon. Moreover, Oregon Union officials may encounter teacher support for professional development initiatives that adopt peer review as discussed by Vacilotto and Cummings (2007). Additionally, this kind of reform may well factor into the recent initiative to continue professional development activities (Kent, 2004).

There was discussion in the context section of whether Oregon educators would be primed to tackle economic issues at the bargaining table. The McDonnell and Pascal model (1976) contends that educators will adopt an economics only perspective in bargaining, and leave behind other issues (such as policy, teaching and learning, etc…), when dealing with threats to fiscal stability. Thus, the need to examine what is commonly endorsed as acceptable labor theory is also warranted.

The model was not affirmed in the present study in the sense that Oregon educators - despite the recent state-wide budget crisis and the numerous previous anti-

tax initiatives in the State of Oregon – largely rejected the "economics only and militancy" cluster of items. Oregon does not appear to be following what has been adopted as a theoretical understanding of the educator labor movement. While the larger State association has tackled economic sustainability issues through the political process in the legislator, individual teachers did not affirm this as the sole purpose of bargaining despite potentially good reasons to do so.

Further Implications of the Study

Examining the happenings related to the administration of the study is critical. It is important to point out that the current study has not escaped political processes in the state of Oregon - suggesting that certain groups find exploration of these topics threatening or controversial. During the administration of this survey, the researcher was contacted by the Oregon Education Association to determine if the study was being funded by the Bill Sizemore initiative which placed teacher merit pay on the Oregon general ballot as was discussed previously (Oregon Initiative 20, 2008). No special funding from any outside group was received for this study.

Additionally, the State association stated that they were "alarmed" by the number of members that began calling the state office to determine if the study would be "used" against them at the bargaining table. This suggests, at some level, this study is a sensitive topic and the reforms being addressed could have a large impact on school districts and their labor strategies. Thus, it would appear that the ability to freely ask questions and get answers is not immune from the political climate in the

State of Oregon (C. Vanderstek, personal communication, April 2nd, 2008; C. Vanderstek, personal communication, April 4th, 2008).

As a response to this concern, the present study acknowledges that there are extensive limitations in the inferences from this one study. Moreover, looking at only the results of one study for any policy change of practice could potentially be disastrous. This study examines the very nature of how teachers have advocated for themselves and their profession through the process of Unionization. This is a complicated topic that can never be fully realized in one simple dissertation project. At best, this study kicks off the dialogue related to Union reforms in the State of Oregon and encourages all parties to carefully examine the findings in light of the methods, analysis, discussion, and researcher bias. This study is not meant to be an ending point, rather a starting point.

Limitations of the Present Study

This present study has several limitations. They are reported here. First, the study was only able to access 8,000 educators versus the 30,000 thousand educators that are currently teaching in the State of Oregon. Whether there are any differences between the Oregon educators who are not in the TSPC database is unknown and follow-up research would be needed to make that determination. With only 800 responding to the survey out of nearly 8,000 invitations, the response rate is considered low.

Additionally, a non-respondent bias analysis was not completed to determine if non-responders were significantly different than responders. The fact of the matter remains: 800 teachers out of approximately 30,000 may not be an adequate sample without understanding how non-respondents would have answered survey items. Because of this, it is useful to consider that further research related to teacher perspectives on New Union reforms is warranted.

This instrument did not have a strong Cronbach's alpha (the current score was .69 total and there were a range of scores on the subtest analysis). While this is not a weak score either, a higher score would have been more desirable. This suggests that the instrument could be made more reliable if it were utilized again. As a recommendation, future researchers should modify the instrument based on the attached factor analysis findings. To increase reliability, it may be useful to eliminate certain items and remove questions that had low performance (such as the item related to teacher militancy and Union practices).

As mentioned in Chapter Four, the goodness of fit indicator for the factor analysis statistics is poor. This suggests that the thematic reductions in the quantitative data set may be an anomaly to the present study - and might not be found in the population of teachers at-large if the study were replicated. This posed a serious issue when attempting to analyze the data for factor patterns. Thus, an HCA model was adopted which allowed the questions to at least be considered within their clustered groups. Whether those same clusters could be found again is unknown.

As a pragmatic recommendation, this researcher suggests that the following forms of study be conducted at the district or regional level. This would allow a

clearer picture of findings that would be generalizable to individual districts. At present, this researcher is not comfortable generalizing the results to any particular district. The results from this study are best presented at the State level in an aggregated format.

Another area of limitation may be related to multiple definitions of the concept of student performance. For instance, the term "student-performance" may have a different definition for different audiences. Consider the fact that respondents were not given a definition of student performance; rather, they were allowed to use their own definitions. Additionally, several of the other terms (such as collaborative bargaining process) may be potentially loaded or biased in their terminology or language.

Areas for Further Research

There are three areas that warrant further exploration. First, there were themes from the qualitative interviews that were not categorizable across all the interviews. Every person who shared through the interview process had a different "twist" on the areas being discovered. In the Murray (2000) study on New Unionism, several teachers were interviewed with a series of semi-structured questions. These questions were then analyzed using a grounded theory method. The themes that were captured were reduced from a large qualitative data set. In this study, only four participants agreed to be interviewed. Thus, the qualitative findings were not as useful as the qualitative findings in the Murray study.

The present study had a limited number of qualitative participants. The results of the qualitative data are probably not representative of the entire population. Rather, the qualitative data merely illustrates how four individuals understand the Union reforms that are being studied. That is not to say that these four individuals do not share common beliefs and values with other teachers across the state. These four individuals just shared what might be possible teacher reaction to the proposed constructs, rather than a representative reaction to the proposed constructs.

Reducing the four interviews to themes is difficult. Thus, the cases have to be analyzed individually. The goal of further research would be to capture themes related to these important policy issues through further qualitative inquiry. In particular a critical incident study may be useful for determining what factors lead people to support or oppose certain reform endeavors.

As was noted, there were differences in responses across age regarding peer review. This suggests that there may be generational differences in how teachers respond to peer review. This may become an important finding as policy makers, Union leaders, and school officials try to understand generational cohort effects and their impact on labor-management relationships. For the Union to maintain its position in the K-12 system "buy-in" from teachers is required as evidenced by the Johnson-Moore et al research (2007).

It would be useful to understand whether teacher beliefs are actually being represented by Union policy and action. Put simply, the Union is an organization grounded in culture and ideology (Kerr-Jessup, 1985). Determining the level of congruence between educator wishes and Union practice would be useful. This data-

set may help frame future research into this area. As was noted in the literature review, there are many unknowns in the research body on Unionism (Hess & West, 2007) and a rationale for multiple studies exists.

In the area of measurement, a multi-dimensional scaling analysis might be useful to shed light on why the Cronbach's alpha did not perform highly on each subtest. Essentially, Cronbach's alpha score is a one-dimensional measure of reliability. It assumes that a subtest or group of items is measuring a singular trait. As discussed in Chapter Four, it is entirely possible that the subtests were measuring more than one trait. What those traits might be is not theorized at this time. But, with further theoretical understandings and continued exploration into the field of Union reforms, understanding the interaction between and within constructs has extensive value for individuals interested in quantitatively understanding beliefs related to the Union.

Another area for future research is related to the above limitation of definitions of some of the concepts used in the study. It may be useful to conduct further research into definitions themselves. For instance, what does "student performance" encompass? How might the term be defined when related to policy issues such as teacher compensation, bargaining or peer review? Future research may explore, through some form of qualitative or quantitative data collection, what kind of definitions find consensus in the professional ranks. For all intents and purposes, it is highly possible that some of the low reliability in the quantitative findings were related to respondents not having common definitions.

Summary & Conclusions

This study has analyzed Oregon educator perceptions of the tenants of New Unionism. Chapter One provided a framework for understanding the need for the study; Chapter Two provided a review of the relevant literature; Chapter Three provided a methodological rationale; Chapter Four, and Appendices A-C, presented the results; and this Chapter discussed those results.

A brief summary is warranted considering the lengthy discussion. This study identified that Oregon educators are strongly opposed to teacher performance pay. The most reliable finding from the study was related to teachers rejecting performance pay, despite growing popularity across the Nation for performance pay programs. In addition, this study has identified that Oregon educators endorse the ideals of collaborative bargaining process. The discussion pointed out that Oregon may already have a "collaborative" culture that exists separate from any National trend. This may be related to the Oregon ideals associated with themes of local control and local decision making in K12 schools. Finally, Oregon educators appeared highly interested in peer review programs, however, they stopped short at endorsing peer review programs related to contract renewal. Educators in Oregon embraced the idea that peers could help facilitate professional growth.

This study has suggested that Oregon educators are supportive of certain forms of New-Union ideals and are in favor of selected post-industrial labor models. Particularly, respondents were in favor of strategic reforms to salary structures – not including linking salary to student achievement. Participants also embraced several of

the tenants of collaborative bargaining processes. This potentially affirmed that Oregon teachers are committed to working with school districts through the bargaining process, instead of utilizing militant labor strategies. Finally, Oregon educators have possibly embraced the idea of a peer review process for professional development purposes. Oregon educators identified that peer review is a powerful means to facilitate the growth of quality teachers at both the veteran and novice level which coincides with the earlier research of Kent (2004). Oregon educators, however, did not extend their comfort of peer review to contract renewal as discussed by Goldstein and Noguera (2006).

This study highlighted that there were differences between Union and non-Union educators in certain areas of survey responses, although more theoretical work is needed to understand the framework behind such differences. This suggested that non-Union teachers may have a different perspective towards labor reforms than Union teachers. Additionally, this study picked up on potential generational cohort differences (quantitative and qualitative). Moreover geographic locale appeared to play a part in response patterns. Other variables, such as Title-One status, job assignment, years of experience, gender, and grade level assignment were also considered.

District, school, and Union leaders are encouraged to proceed with caution when implementing any of these reforms. Moreover, leaders are urged to survey teachers in their own districts prior to implementing these labor reforms. As a finding from previous research suggests, teacher buy-in is critical for any Union initiated labor reform and teachers must see the value of the proposed labor reform (Johnson-Moore

et al, 2007). As was indicated in this data set, there are still places of divergence.

Thus, reforming for the sake of reform may be without merit in the minds of Oregon

educators.

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Appendix A

Raw Survey Results

Table A.1. *Alternative Salary Items.*

Answer Options	Strongly Disagree	Disagree	Agree	Strongly Agree	Rating Average	Response Count
Educators should be compensated for increases in student performance.	241	321	179	31	2	772
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	45	238	405	84	2.69	772
Student performance provides objective criteria for pay-for-performance.	425	275	68	10	1.57	778
Standardized achievement test results are indicators of teacher performance.	425	271	76	8	1.57	780
I would be comfortable with my salary being tied to student performance.	450	224	83	17	1.57	774
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	122	187	377	89	2.56	775
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc...).	83	158	408	121	2.74	770
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	68	213	394	92	2.67	767
Teacher education level (graduate coursework, advanced certificates, etc...) should be used to determine educator salary level.	8	38	468	262	3.27	776
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	5	15	432	327	3.39	779
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	15	33	392	342	3.36	782

Table A.2. *Collaborative Bargaining Items*

Answer Options	Strongly Disagree	Disagree	Agree	Strongly Agree	Mean	Count
Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.	18	83	397	238	3.16	736
Teacher Unions should only bargain for economic necessities such as salary and benefits.	245	418	54	19	1.80	736
Bargaining is a tool to establish sound policies.	19	118	459	122	2.95	718
Teacher Unions' first priorities should be related to learning needs.	27	288	291	118	2.69	724
Teacher Unions' first priorities should be related to teacher needs.	21	135	376	198	3.033	730
Teacher Unions should be creating and advocating for systems of shared governance in K-12 schools.	13	121	441	117	2.96	692
Teacher Unions should encourage building level control over working conditions.	38	197	395	86	2.74	716
Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.	55	272	282	105	2.61	714
Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values.	2	18	434	288	3.36	742
Identification of common goals, beliefs and values should be the starting point for bargaining with school districts.	8	25	495	203	3.22	731
Teachers win when teacher Unions adopt militant strategies.	272	363	68	9	1.74	712
Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.	43	185	424	70	2.72	722
Teacher bargaining agreements should respond to the needs of districts.	25	150	474	75	2.83	724

Table A.3. *Peer Review Programs.*

Answer Options	Strongly Disagree	Disagree	Agree	Strongly Agree	Rating Average	Response Count
The Union should take a more active role in the quality control of teachers.	48	199	332	123	2.76	702
Teacher performance evaluations should be completed only by a building principal.	76	403	180	56	2.30	715
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	74	221	338	68	2.57	701
Peer review would solve problems with low performing teachers.	61	346	267	24	2.36	698
Peer review is appropriate for professional development.	16	88	485	125	3.00	714
Peer review is not appropriate for determinations related to contract renewal.	18	272	296	116	2.72	702
My classroom teaching strategies, methods, and organization are not the concern of my peers.	153	451	85	31	1.99	720
Teachers should be responsible for quality control of their peers.	90	378	212	27	2.25	707
Peer review has excellent potential for enhancing education.	13	112	450	130	2.99	705
Peer review programs may leave individual teachers feeling isolated or alienated.	28	218	363	88	2.733	697
New teachers need an induction program that includes a peer review component (e.g., mentoring).	2	21	340	360	3.46	723
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	32	133	448	96	2.86	709

Table A.4. *Familiarity with Alternative Pay Plans.*

Answer Options	Response Percent	Response Count
I am very familiar with alternative pay plans for teachers	9.2%	68
I am somewhat familiar with alternative pay plans for teachers	53.8%	396
I am not familiar with alternative pay plans for teachers	37.0%	272
	answered question	736

Table A.5. *Familiarity with Alternative Bargaining.*

Table 5Answer Options	Response Percent	Response Count
I am very familiar with issues related to bargaining and contract maintenance.	18.0%	131
I am somewhat familiar with issues related to bargaining and contract maintenance.	53.4%	389
I am not familiar with issues related to bargaining and contract maintenance.	28.6%	208
	answered question	728

Table A.6. *Familiarity with Peer Review Programs.*

Answer Options	Response Percent	Response Count
I am very familiar with peer review programs in K12	11.9%	85
I am somewhat familiar with peer review programs in K12	59.2%	423
I am not familiar with peer review programs in K12	28.9%	206
	answered question	736

Table A.7. *Demographics 1.*

Gender	Response Percent	Response Count
Male	35.8%	257
Female	64.2%	460
	answered question	717
	skipped question	174
Job Assignment	**Response Percent**	**Response Count**
I am a classroom teacher	75.7%	520
I am a school counselor	7.4%	51
I am another certified employee	18.6%	128
Member of the Union	**Response Percent**	**Response Count**
yes	91.3%	661
no	8.7%	63

Table A.8. *Demographics 2.*

Education Level	Response Percent	Response Count
BA	5.6%	41
BA+45	12.9%	94
MA	39.0%	284
MA+45	39.2%	286
Ed.D. /PhD or other professional doctorate	3.3%	24
Title-I Status	**Response Percent**	**Response Count**
Yes (Title-I)	56.3%	404
No	44.1%	316
Building Level	**Response Percent**	**Response Count**
An Elementary School	33.7%	244
A Middle School	22.6%	164
A High School	33.2%	241
Other	10.5%	76

Table A.9. *Demographics 3.*

Age Bands	Response Percent	Response Count
20-29 years old	13.4%	98
30-39 years old	29.7%	217
40-49 years old	23.0%	168
50-59 years old	29.5%	215
60-69 years old	3.3%	24
prefer not to disclose	1.1%	8
Ethnicity	Response Percent	Response Count
I would prefer not to answer	9.7%	71
African American	0.3%	2
Hispanic or Latino	3.0%	22
Native American	0.8%	6
Asian-American / Hawaiian or other Pacific Islander	1.6%	12
Caucasian of European Descent	81.9%	598
Other	2.6%	19
Geographic Locale	Response Percent	Response Count
Portland Metro	38.9%	283
Willamette Valley	28.6%	208
Southern Oregon	9.5%	69
The Coast	7.0%	51
East of the Cascades	16.0%	116

Table A.10. *Years of Experience.*

Average Years Teaching	Response Count
12.3 Years	718

Appendix B

Simple Means Comparisons

Table B.1. *Gender Differences by Item.*

Item	Mean of Male Responses	Mean of Female Responses	Standard Deviation
Educators should be compensated for increases in student performance.	2.09	1.92	0.83
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	2.71	2.67	0.73
Student performance provides objective criteria for pay-for-performance.	1.63	1.52	0.69
Standardized achievement test results are indicators of teacher performance.	1.65	1.52	0.69
I would be comfortable with my salary being tied to student performance.	1.65	1.51	0.76
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	2.53	2.57	0.88
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc…).	2.76	2.73	0.85
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	2.73	2.63	0.80
Teacher education level (graduate coursework, advanced certificates, etc…) should be used to determine educator salary level.	3.24	3.27	0.59
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	3.37	3.38	0.56
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	3.36	3.36	0.65

Table B.2. *Continued Gender Differences by Item.*

Item	Mean of Male Responses	Mean of Female Responses	Standard Deviation
Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.	3.01	3.25	0.71
Teacher Unions should only bargain for economic necessities such as salary and benefits.	1.80	1.80	0.69
Bargaining is a tool to establish sound policies.	2.88	3.00	0.65
Teacher Unions' first priorities should be related to learning needs.	2.63	2.73	0.79
Teacher Unions' first priorities should be related to teacher needs.	3.02	3.04	0.75
Teacher Unions should be creating and advocating for systems of shared governance in K-12 schools.	2.92	2.97	0.64
Teacher Unions should encourage building level control over working conditions.	2.80	2.70	0.74
Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.	2.63	2.61	0.83
Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values.	3.38	3.34	0.55
Identification of common goals, beliefs and values should be the starting point for bargaining with school districts.	3.17	3.25	0.55
Teachers win when teacher Unions adopt militant strategies.	1.78	1.70	0.67
Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.	2.73	2.72	0.71
Teacher bargaining agreements should respond to the needs of districts.	2.84	2.83	0.65

Table B.3. *Continued Gender Differences by Item.*

Item	Mean of Male Responses	Mean of Female Responses	Standard Deviation
The Union should take a more active role in the quality control of teachers.	2.81	2.72	0.82
Teacher performance evaluations should be completed only by a building principal.	2.16	2.39	0.76
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	2.60	2.56	0.81
Peer review would solve problems with low performing teachers.	2.43	2.32	0.69
Peer review is appropriate for professional development.	3.05	2.98	0.63
Peer review is not appropriate for determinations related to contract renewal.	2.60	2.79	0.76
My classroom teaching strategies, methods, and organization are not the concern of my peers.	1.98	1.98	0.70
Teachers should be responsible for quality control of their peers.	2.39	2.18	0.72
Peer review has excellent potential for enhancing education.	2.98	2.99	0.65
Peer review programs may leave individual teachers feeling isolated or alienated.	2.73	2.74	0.72
New teachers need an induction program that includes a peer review component (e.g., mentoring).	3.41	3.49	0.57
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	2.91	2.83	0.70

It would appear that gender did not directly influence any of the items on the survey. The average responses, when examined by gender, remain fairly close to one another across all items on the survey.

Table B.4. *Number of Years Teaching.*

	1*	2*	3*	4*	Standard Deviation
Educators should be compensated for increases in student performance.	2.06	2.00	1.92	1.88	0.83
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	2.55	2.66	2.75	2.77	0.73
Student performance provides objective criteria for pay-for-performance.	1.56	1.59	1.51	1.50	0.69
Standardized achievement test results are indicators of teacher performance.	1.50	1.57	1.59	1.54	0.70
I would be comfortable with my salary being tied to student performance.	1.58	1.56	1.54	1.54	0.75
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	2.72	2.63	2.46	2.38	0.89
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc…).	2.62	2.77	2.81	2.71	0.86
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	2.88	2.72	2.54	2.49	0.80
Teacher education level (graduate coursework, advanced certificates, etc…) should be used to determine educator salary level.	3.25	3.26	3.27	3.31	0.59
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	3.31	3.39	3.37	3.42	0.56
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	3.40	3.30	3.43	3.36	0.66

* 1= 0-3 Years; 2 = 4-10 years; 3= 11-20 years; 4 = 20+ years

Table B.5. *Number of Years Teaching.*

	1*	2*	3*	4*	Standard Deviation
Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.	3.17	3.13	3.13	3.24	0.72
Teacher Unions should only bargain for economic necessities such as salary and benefits.	1.93	1.79	1.74	1.74	0.68
Bargaining is a tool to establish sound policies.	2.94	2.95	2.95	2.98	0.66
Teacher Unions' first priorities should be related to learning needs.	2.74	2.71	2.64	2.66	0.78
Teacher Unions' first priorities should be related to teacher needs.	3.17	3.06	2.99	2.92	0.75
Teacher Unions should be creating and advocating for systems of shared governance in K-12 schools.	3.01	2.95	2.85	3.03	0.64
Teacher Unions should encourage building level control over working conditions.	2.81	2.75	2.74	2.66	0.74
Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.	2.68	2.66	2.55	2.52	0.83
Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values.	3.33	3.31	3.36	3.49	0.55
Identification of common goals, beliefs and values should be the starting point for bargaining with school districts.	3.21	3.14	3.30	3.30	0.56
Teachers win when teacher Unions adopt militant strategies.	1.84	1.78	1.73	1.61	0.67
Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.	2.83	2.72	2.73	2.65	0.72
Teacher bargaining agreements should respond to the needs of districts.	2.90	2.78	2.86	2.86	0.65

* 1= 0-3 Years; 2 = 4-10 years; 3= 11-20 years; 4 = 20+ years

Table B.6. *Continued Number of Years Teaching.*

	1*	2*	3*	4*	Standard Deviation
The Union should take a more active role in the quality control of teachers.	2.65	2.80	2.77	2.72	0.82
Teacher performance evaluations should be completed only by a building principal.	2.14	2.27	2.38	2.37	0.76
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	2.62	2.65	2.60	2.34	0.81
Peer review would solve problems with low performing teachers.	2.37	2.40	2.39	2.25	0.69
Peer review is appropriate for professional development.	3.07	3.04	3.01	2.89	0.63
Peer review is not appropriate for determinations related to contract renewal.	2.65	2.69	2.77	2.80	0.76
My classroom teaching strategies, methods, and organization are not the concern of my peers.	2.01	1.92	2.01	2.11	0.71
Teachers should be responsible for quality control of their peers.	2.30	2.30	2.20	2.16	0.72
Peer review has excellent potential for enhancing education.	3.02	3.04	2.99	2.83	0.65
Peer review programs may leave individual teachers feeling isolated or alienated.	2.71	2.72	2.73	2.79	0.73
New teachers need an induction program that includes a peer review component (e.g., mentoring).	3.39	3.50	3.46	3.44	0.57
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	2.89	2.93	2.84	2.74	0.69

* 1= 0-3 Years; 2 = 4-10 years; 3= 11-20 years; 4 = 20+ years

When looking at responses based on number of years teaching, based on items, it appears there are no outlier groups.

Table B.7. *Age 1.*

	1*	2*	3*	4*	5*	6*	7*	SD
Salary Item #1	1.93	2.00	1.98	1.93	2.36	2.00	1.97	0.83
Salary Item #2	2.73	2.61	2.67	2.76	2.39	3.00	2.68	0.73
Salary Item #3	1.49	1.58	1.51	1.57	1.83	1.63	1.56	0.70
Salary Item #4	1.45	1.57	1.58	1.54	1.96	1.75	1.56	0.69
Salary Item #5	1.46	1.60	1.51	1.56	1.79	1.63	1.55	0.76
Salary Item #6	2.60	2.73	2.47	2.39	2.71	2.86	2.55	0.89
Salary Item #7	2.65	2.85	2.74	2.69	2.88	2.00	2.75	0.86
Salary Item #8	2.97	2.68	2.63	2.53	2.58	2.63	2.66	0.80
Salary Item #9	3.21	3.35	3.25	3.24	3.13	3.29	3.27	0.59
Salary Item #10	3.35	3.41	3.40	3.37	3.33	3.29	3.38	0.56
Salary Item #11	3.36	3.38	3.34	3.36	3.29	3.50	3.36	0.66

Note 1: 1= 20 years old +; 2 = 30 years old+; 3 = 40 years old +; 4 = 50years old +; 5 = 60 years old +; 6 = prefer not to disclose +; 7 = overall mean of aggregated groups; SD = Standard Deviation. Note 2: Items were coded as "Item #1, Item #" 2 to meet APA formatting requirements – to see what the items were see the complete item list in Appendix A.

Table B.8. *Age 2*

	1*	2*	3*	4*	5*	6*	7*	SD
Bargaining Item #1	3.15	3.08	3.18	3.25	3.00	3.50	3.16	0.71
Bargaining Item #2	1.96	1.84	1.67	1.78	1.67	1.71	1.79	0.68
Bargaining Item #3	2.96	3.02	2.99	2.90	2.70	3.43	2.96	0.66
Bargaining Item #4	2.66	2.77	2.60	2.66	2.82	2.75	2.69	0.79
Bargaining Item #5	3.17	3.08	3.05	2.96	2.50	3.57	3.04	0.75
Bargaining Item #6	2.89	2.97	2.94	2.98	3.00	2.86	2.96	0.64
Bargaining Item #7	2.85	2.76	2.66	2.72	2.91	3.00	2.74	0.74
Bargaining Item #8	2.60	2.61	2.54	2.69	2.71	2.50	2.62	0.83
Bargaining Item #9	3.30	3.34	3.32	3.42	3.54	3.25	3.36	0.55
Bargaining Item #10	3.14	3.23	3.21	3.25	3.25	3.25	3.22	0.56
Bargaining Item #11	1.85	1.81	1.70	1.64	1.71	2.25	1.74	0.68
Bargaining Item #12	2.78	2.75	2.68	2.70	2.96	2.29	2.72	0.72
Bargaining Item #13	2.85	2.83	2.78	2.88	2.74	2.50	2.83	0.65

Note 1: 1= 20 years old +; 2 = 30 years old+; 3 = 40 years old +; 4 = 50years old +; 5 = 60 years old +; 6 = prefer not to disclose +; 7 = overall mean of aggregated groups. Note 2: Items were coded as "Item #1, Item #" 2 to meet APA formatting requirements – to see what the items were see the complete item list in Appendix A.

Table B.9. *Age 3.*

	1*	2*	3*	4*	5*	6*	7*	SD
Peer Review #1	2.71	2.83	2.76	2.69	2.88	3.13	2.76	0.82
Peer Review #2	2.21	2.24	2.41	2.33	2.13	2.43	2.30	0.76
Peer Review #3	2.71	2.66	2.57	2.40	2.67	2.29	2.57	0.81
Peer Review #4	2.40	2.43	2.35	2.28	2.52	2.25	2.36	0.69
Peer Review #5	3.04	3.06	3.01	2.95	3.08	2.57	3.01	0.63
Peer Review #6	2.67	2.70	2.79	2.75	2.46	3.29	2.73	0.76
Peer Review #7	2.02	1.88	2.04	2.04	1.96	2.38	1.99	0.71
Peer Review #8	2.36	2.26	2.21	2.23	2.36	2.00	2.25	0.72
Peer Review #9	3.03	3.09	2.98	2.92	2.79	2.38	2.99	0.65
Peer Review #10	2.72	2.70	2.81	2.74	2.70	2.43	2.74	0.73
Peer Review #11	3.53	3.52	3.43	3.42	3.42	3.38	3.47	0.57
Peer Review #12	2.97	2.90	2.83	2.77	3.09	2.88	2.86	0.70

Note 1: 1= 20 years old +; 2 = 30 years old+; 3 = 40 years old +; 4 = 50years old +; 5 = 60 years old +; 6 = prefer not to disclose +; 7 = overall mean of aggregated groups. Note 2: Items were coded as "Item #1, Item #" 2 to meet APA formatting requirements – to see what the items were see the complete item list in Appendix A.

The means comparison shows the age category may influence response patterns. Thus inferential analysis is warranted.

Table B.10. *Ethnicity 1.*

	1	2	3	4	5
Educators should be compensated for increases in student performance.	1.94	1.97	2.16	2.00	0.84
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	2.75	2.67	2.72	2.68	0.74
Student performance provides objective criteria for pay-for-performance.	1.67	1.54	1.63	1.57	0.71
Standardized achievement test results are indicators of teacher performance.	1.71	1.55	1.60	1.57	0.71
I would be comfortable with my salary being tied to student performance.	1.56	1.55	1.68	1.57	0.77
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	2.51	2.54	2.68	2.56	0.89
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc…).	2.61	2.76	2.73	2.74	0.85
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	2.57	2.67	2.73	2.67	0.80
Teacher education level (graduate coursework, advanced certificates, etc…) should be used to determine educator salary level.	3.26	3.25	3.40	3.27	0.60
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	3.28	3.39	3.44	3.39	0.56
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	3.21	3.38	3.32	3.36	0.65

Notes: 1 = Not Disclosed; 2 = Anglo-European; 3= Identified as another ethnicity; 4 = Mean; 5 = Standard Deviation

Table B.11. *Ethnicity 2.*

	1	2	3	4	5
Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.	3.01	3.17	3.27	3.16	0.71
Teacher Unions should only bargain for economic necessities such as salary and benefits.	2.00	1.76	1.83	1.79	0.68
Bargaining is a tool to establish sound policies.	2.71	2.97	3.05	2.95	0.66
Teacher Unions' first priorities should be related to learning needs.	2.57	2.70	2.76	2.69	0.79
Teacher Unions' first priorities should be related to teacher needs.	3.01	3.02	3.12	3.03	0.76
Teacher Unions should be creating and advocating for systems of shared governance in K-12 schools.	2.85	2.95	3.08	2.96	0.64
Teacher Unions should encourage building level control over working conditions.	2.69	2.73	2.84	2.74	0.74
Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.	2.71	2.59	2.73	2.61	0.83
Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values.	3.30	3.36	3.40	3.36	0.54
Identification of common goals, beliefs and values should be the starting point for bargaining with school districts.	3.09	3.22	3.37	3.22	0.55
Teachers win when Unions adopt militant strategies.	1.78	1.72	1.83	1.74	0.68
Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.	2.71	2.72	2.75	2.72	0.72
Teacher bargaining agreements should respond to the needs of districts.	2.73	2.87	2.65	2.83	0.65

Notes: 1 = Not Disclosed; 2 = Anglo-European; 3= Identified as another ethnicity; 4 = Mean; 5 = Standard Deviation

Table B.12. *Ethnicity 3.*

	1	2	3	4	5
The Union should take a more active role in the quality control of teachers.	2.69	2.74	2.97	2.76	0.82
Teacher performance evaluations should be completed only by a building principal.	2.24	2.29	2.50	2.30	0.76
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	2.56	2.58	2.51	2.57	0.81
Peer review would solve problems with low performing teachers.	2.41	2.35	2.48	2.36	0.69
Peer review is appropriate for professional development.	2.94	2.99	3.19	3.01	0.62
Peer review is not appropriate for determinations related to contract renewal.	2.85	2.71	2.77	2.73	0.76
My classroom teaching strategies, methods, and organization are not the concern of my peers.	2.10	1.98	1.95	1.99	0.71
Teachers should be responsible for quality control of their peers.	2.22	2.25	2.31	2.25	0.72
Peer review has excellent potential for enhancing education.	2.90	2.99	3.05	2.99	0.65
Peer review programs may leave individual teachers feeling isolated or alienated.	2.87	2.72	2.70	2.73	0.73
New teachers need an induction program that includes a peer review component (e.g., mentoring).	3.38	3.47	3.47	3.46	0.57
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	2.82	2.86	2.92	2.86	0.70

1 = Not Disclosed; 2 = Anglo-European; 3= Identified as another ethnicity; 4 = Mean; 5 = Standard Deviation

Table B.13. *Title-One Status 1.*

	YES	NO	Standard Deviation
Educators should be compensated for increases in student performance.	1.97	1.98	0.83
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	2.67	2.69	0.73
Student performance provides objective criteria for pay-for-performance.	1.56	1.56	0.69
Standardized achievement test results are indicators of teacher performance.	1.57	1.54	0.70
I would be comfortable with my salary being tied to student performance.	1.54	1.58	0.75
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	2.56	2.54	0.89
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc…).	2.70	2.81	0.86
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	2.64	2.69	0.80
Teacher education level (graduate coursework, advanced certificates, etc…) should be used to determine educator salary level.	3.25	3.29	0.59
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	3.38	3.40	0.56
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	3.35	3.37	0.66

Table B.14. *Title-One Status 2.*

	YES	NO	Standard Deviation
Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.	3.21	3.11	0.71
Teacher Unions should only bargain for economic necessities such as salary and benefits.	1.79	1.79	0.68
Bargaining is a tool to establish sound policies.	2.95	2.98	0.66
Teacher Unions' first priorities should be related to learning needs.	2.67	2.70	0.79
Teacher Unions' first priorities should be related to teacher needs.	3.04	3.03	0.76
Teacher Unions should be creating and advocating for systems of shared governance in K-12 schools.	2.98	2.92	0.64
Teacher Unions should encourage building level control over working conditions.	2.78	2.70	0.74
Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.	2.66	2.56	0.83
Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values.	3.37	3.34	0.54
Identification of common goals, beliefs and values should be the starting point for bargaining with school districts.	3.21	3.24	0.55
Teachers win when teacher Unions adopt militant strategies.	1.72	1.76	0.68
Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.	2.75	2.68	0.72
Teacher bargaining agreements should respond to the needs of districts.	2.84	2.81	0.65

Table B.15. *Title-One Status 3.*

	YES	NO	Standard Deviation
The Union should take a more active role in the quality control of teachers.	2.72	2.80	0.82
Teacher performance evaluations should be completed only by a building principal.	2.30	2.31	0.76
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	2.58	2.54	0.81
Peer review would solve problems with low performing teachers.	2.32	2.44	0.69
Peer review is appropriate for professional development.	2.98	3.03	0.62
Peer review is not appropriate for determinations related to contract renewal.	2.76	2.69	0.76
My classroom teaching strategies, methods, and organization are not the concern of my peers.	1.97	2.02	0.71
Teachers should be responsible for quality control of their peers.	2.23	2.28	0.72
Peer review has excellent potential for enhancing education.	2.95	3.04	0.65
Peer review programs may leave individual teachers feeling isolated or alienated.	2.76	2.72	0.73
New teachers need an induction program that includes a peer review component (e.g., mentoring).	3.46	3.49	0.57
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	2.86	2.86	0.70

Table B.16. *Education Level 1.*

	1	2	3	4	5	6	7
Educators should be compensated for increases in student performance.	1.88	1.94	2.22	2.00	2.12	1.98	0.83
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	2.70	2.70	2.71	2.66	2.61	2.68	0.73
Student performance provides objective criteria for pay-for-performance.	1.48	1.59	1.62	1.56	1.66	1.56	0.70
Standardized achievement test results are indicators of teacher performance.	1.49	1.60	1.66	1.65	1.59	1.57	0.70
I would be comfortable with my salary being tied to student performance.	1.46	1.58	1.57	1.59	1.72	1.56	0.76
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	2.58	2.55	2.44	2.43	2.58	2.55	0.89
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions…	2.75	2.83	2.65	2.71	2.67	2.75	0.86
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	2.65	2.64	2.62	2.78	2.72	2.66	0.80
Teacher education level (graduate coursework, advanced certificates, etc...) should be used to determine educator salary level.	3.31	3.22	3.27	3.22	3.25	3.26	0.59
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	3.40	3.40	3.33	3.25	3.40	3.38	0.56
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	3.41	3.31	3.35	3.51	3.26	3.36	0.66

Notes: *1=BA, 2 = BA+45, M= MA, 4=MA+45, 5= Doctorate, 6 = Average Across Groups, 7 = SD.*

Table B.17. *Education Level 2.*

	1	2	3	4	5	Total	SD
Bargaining Item #1	3.21	3.06	3.25	3.19	3.15	3.16	0.71
Bargaining Item #2	1.66	1.92	1.74	2.02	1.82	1.79	0.69
Bargaining Item #3	3.04	2.90	2.88	2.83	2.95	2.96	0.66
Bargaining Item #4	2.68	2.71	2.67	2.68	2.69	2.69	0.79
Bargaining Item #5	3.07	3.01	3.00	2.88	3.09	3.03	0.75
Bargaining Item #6	3.00	2.87	3.02	2.85	2.99	2.95	0.64
Bargaining Item #7	2.71	2.67	2.78	2.91	2.83	2.74	0.74
Bargaining Item #8	2.50	2.66	2.76	2.78	2.66	2.62	0.83
Bargaining Item #9	3.39	3.38	3.33	3.27	3.28	3.36	0.55
Bargaining Item #10	3.27	3.21	3.09	3.29	3.17	3.22	0.56
Bargaining Item #11	1.79	1.72	1.75	1.63	1.69	1.74	0.68
Bargaining Item #12	2.65	2.70	2.84	2.86	2.83	2.72	0.72
Bargaining Item #14	2.80	2.84	2.82	2.94	2.84	2.83	0.65

Note 1: 1= BA, 2 = BA+45, M= MA, 4=MA+45, 5= Doctorate; SD = Standard Deviation.   Note 2: Items were coded as "Item #1, Item #" 2 to meet APA formatting requirements – to see what the items were see the complete item list in Appendix A.

Table B.18. *Education Level 3.*

	1	2	3	4	5	Total	SD
The Union should take a more active role in the quality control of teachers.	2.77	2.68	2.77	2.86	2.80	2.76	0.82
Teacher performance evaluations should be completed only by a building principal.	2.33	2.27	2.21	2.16	2.39	2.30	0.76
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	2.55	2.64	2.55	2.49	2.58	2.57	0.81
Peer review would solve problems with low performing teachers.	2.31	2.39	2.54	2.39	2.35	2.36	0.69
Peer review is appropriate for professional development.	3.02	3.03	3.09	2.98	2.92	3.01	0.62
Peer review is not appropriate for determinations related to contract renewal.	2.78	2.70	2.71	2.55	2.71	2.72	0.76
My classroom teaching strategies, methods, and organization are not the concern of my peers.	1.97	2.01	1.91	1.94	2.09	1.99	0.71
Teachers should be responsible for quality control of their peers.	2.19	2.26	2.43	2.28	2.28	2.25	0.72
Peer review has excellent potential for enhancing education.	3.00	2.98	3.14	2.98	2.90	2.99	0.65
Peer review programs may leave individual teachers feeling isolated or alienated.	2.74	2.75	2.58	2.69	2.84	2.74	0.72
New teachers need an induction program that includes a peer review component (e.g., mentoring).	3.50	3.43	3.43	3.41	3.50	3.47	0.57
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	2.82	2.89	2.97	2.88	2.83	2.86	0.69

1=BA, 2 = BA+45, M= MA, 4=MA+45, 5= Doctorate; SD = Standard Deviation

Table B.19. *Job Function 1*

	3	2	1	Total	SD
Educators should be compensated for increases in student performance.	2.06	2.16	1.93	1.93	0.82
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	2.68	2.47	2.72	2.72	0.71
Student performance provides objective criteria for pay-for-performance.	1.68	1.71	1.49	1.49	0.66
Standardized achievement test results are indicators of teacher performance.	1.70	1.65	1.51	1.51	0.68
I would be comfortable with my salary being tied to student performance.	1.57	1.67	1.52	1.52	0.74
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	2.67	2.56	2.52	2.52	0.90
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc…).	2.76	2.72	2.73	2.73	0.89
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	2.68	2.61	2.64	2.64	0.82
Teacher education level (graduate coursework, advanced certificates, etc…) should be used to determine educator salary level.	3.31	3.14	3.27	3.27	0.60
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	3.40	3.39	3.37	3.37	0.57
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	3.42	3.28	3.34	3.34	0.67

3 =Other, 2 = Counselor, 1 = Classroom Educator; SD = Standard Deviation

Table B.20. *Job Function 2.*

	3	2	1	Total	SD
Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.	3.19	3.10	3.17	3.17	0.71
Teacher Unions should only bargain for economic necessities such as salary and benefits.	1.77	2.00	1.77	1.77	0.67
Bargaining is a tool to establish sound policies.	2.98	2.93	2.98	2.98	0.64
Teacher Unions' first priorities should be related to learning needs.	2.86	2.77	2.62	2.62	0.78
Teacher Unions' first priorities should be related to teacher needs.	2.82	2.67	3.14	3.14	0.70
Teacher Unions should be creating and advocating for systems of shared governance in K-12 schools.	2.97	3.19	2.95	2.95	0.64
Teacher Unions should encourage building level control over working conditions.	2.67	2.86	2.76	2.76	0.74
Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.	2.71	2.72	2.58	2.58	0.83
Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values.	3.40	3.44	3.31	3.31	0.54
Identification of common goals, beliefs and values should be the starting point for bargaining with school districts.	3.29	3.24	3.18	3.18	0.55
Teachers win when teacher Unions adopt militant strategies.	1.62	1.57	1.82	1.82	0.66
Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.	2.73	2.89	2.67	2.67	0.71
Teacher bargaining agreements should respond to the needs of districts.	2.95	2.85	2.79	2.79	0.64

3 = Other Assignment, 2 = Counselor, 1 = Classroom Educator; SD = Standard Deviation

Table B.21. *Job Function 3.*

	3	2	1	Total	SD
The Union should take a more active role in the quality control of teachers.	2.81	2.81	2.72	2.72	0.80
Teacher performance evaluations should be completed only by a building principal.	2.27	2.14	2.32	2.32	0.76
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	2.68	2.54	2.52	2.52	0.81
Peer review would solve problems with low performing teachers.	2.34	2.38	2.36	2.36	0.69
Peer review is appropriate for professional development.	3.02	2.94	3.00	3.00	0.64
Peer review is not appropriate for determinations related to contract renewal.	2.63	2.62	2.76	2.76	0.77
My classroom teaching strategies, methods, and organization are not the concern of my peers.	1.92	1.92	2.03	2.03	0.72
Teachers should be responsible for quality control of their peers.	2.23	2.19	2.25	2.25	0.71
Peer review has excellent potential for enhancing education.	3.07	2.98	2.96	2.96	0.64
Peer review programs may leave individual teachers feeling isolated or alienated.	2.75	2.80	2.74	2.74	0.71
New teachers need an induction program that includes a peer review component (e.g., mentoring).	3.47	3.43	3.46	3.46	0.56
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	2.94	2.81	2.84	2.84	0.69

3 =Other, 2 = Counselor, 1 = Classroom Educator; SD = Standard Deviation

Table B.22. *Building Assignment 1.*

	1*	2*	3*	4*	Total	SD
Educators should be compensated for increases in student performance.	1.86	1.94	2.10	2.03	1.98	0.83
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	2.73	2.72	2.69	2.48	2.69	0.73
Student performance provides objective criteria for pay-for-performance.	1.53	1.53	1.58	1.64	1.56	0.69
Standardized achievement test results are indicators of teacher performance.	1.53	1.55	1.59	1.63	1.56	0.70
I would be comfortable with my salary being tied to student performance.	1.49	1.57	1.60	1.59	1.55	0.76
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	2.61	2.50	2.49	2.65	2.55	0.89
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc…).	2.76	2.68	2.77	2.77	2.75	0.86
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	2.55	2.73	2.74	2.65	2.66	0.80
Teacher education level (graduate coursework, advanced certificates, etc…) should be used to determine educator salary level.	3.28	3.24	3.27	3.29	3.27	0.59
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	3.34	3.39	3.42	3.39	3.38	0.56
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	3.35	3.35	3.37	3.39	3.36	0.66

1 = Elementary, 2 = Middle, 3 = High, 4= Other; SD = Standard Deviation

Table B.23. *Building Assignment 2.*

	1	2	3	4	Total	SD
Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.	3.19	3.27	3.09	3.08	3.16	0.71
Teacher Unions should only bargain for economic necessities such as salary and benefits.	1.84	1.70	1.81	1.74	1.79	0.68
Bargaining is a tool to establish sound policies.	2.96	3.05	2.95	2.83	2.96	0.66
Teacher Unions' first priorities should be related to learning needs.	2.72	2.64	2.67	2.75	2.69	0.79
Teacher Unions' first priorities should be related to teacher needs.	3.11	3.08	3.01	2.78	3.04	0.75
Teacher Unions should be creating and advocating for systems of shared governance in K-12 schools.	2.95	2.95	3.00	2.86	2.96	0.64
Teacher Unions should encourage building level control over working conditions.	2.66	2.64	2.91	2.69	2.74	0.74
Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.	2.61	2.60	2.62	2.64	2.61	0.83
Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values.	3.34	3.29	3.39	3.45	3.36	0.55
Identification of common goals, beliefs and values should be the starting point for bargaining with school districts.	3.27	3.15	3.20	3.28	3.22	0.56
Teachers win when Unions adopt militant strategies.	1.71	1.75	1.81	1.59	1.74	0.67
Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.	2.64	2.69	2.82	2.79	2.73	0.72
Teacher bargaining agreements should respond to the needs of districts.	2.82	2.83	2.83	2.89	2.83	0.65

1 = Elementary, 2 = Middle, 3 = High, 4= Other; SD = Standard Deviation

Table B.24. *Building Assignment 3.*

	1	2	3	4	Total	SD
The Union should take a more active role in the quality control of teachers.	2.72	2.82	2.74	2.79	2.76	0.82
Teacher performance evaluations should be completed only by a building principal.	2.38	2.35	2.17	2.36	2.30	0.76
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	2.51	2.49	2.69	2.58	2.57	0.81
Peer review would solve problems with low performing teachers.	2.25	2.45	2.42	2.34	2.36	0.69
Peer review is appropriate for professional development.	2.95	3.04	3.06	2.99	3.01	0.63
Peer review is not appropriate for determinations related to contract renewal.	2.81	2.83	2.58	2.71	2.73	0.76
My classroom teaching strategies, methods, and organization are not the concern of my peers.	1.97	2.01	2.00	2.01	1.99	0.71
Teachers should be responsible for quality control of their peers.	2.24	2.28	2.27	2.18	2.25	0.72
Peer review has excellent potential for enhancing education.	2.98	3.03	3.02	2.86	2.99	0.65
Peer review programs may leave individual teachers feeling isolated or alienated.	2.78	2.82	2.68	2.61	2.74	0.73
New teachers need an induction program that includes a peer review component (e.g., mentoring).	3.49	3.56	3.36	3.53	3.47	0.56
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	2.82	2.85	2.90	2.89	2.86	0.69

1 = Elementary, 2 = Middle, 3 = High, 4= Other; SD = Standard Deviation

It would appear that building assignment did not result in differences between the means. Thus, building assignment will not be subjected to any further inferential analysis.

Table B.25. *Union Membership 1.*

Item	YES	NO	Total	SD
Educators should be compensated for increases in student performance.	1.94	2.42	1.98	0.83
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	2.72	2.35	2.68	0.73
Student performance provides objective criteria for pay-for-performance.	1.52	1.98	1.56	0.70
Standardized achievement test results are indicators of teacher performance.	1.53	1.98	1.57	0.70
I would be comfortable with my salary being tied to student performance.	1.51	2.10	1.56	0.76
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	2.53	2.84	2.56	0.89
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc…).	2.72	3.02	2.75	0.86
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	2.63	3.05	2.67	0.80
Teacher education level (graduate coursework, advanced certificates, etc…) should be used to determine educator salary level.	3.28	3.13	3.26	0.59
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	3.37	3.55	3.39	0.56
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	3.35	3.45	3.36	0.66

SD = Standard Deviation

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Table B.26. *Union Membership 2.*

Item	YES	NO	Total	SD
Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.	3.18	2.93	3.16	0.71
Teacher Unions should only bargain for economic necessities such as salary and benefits.	1.75	2.27	1.79	0.69
Bargaining is a tool to establish sound policies.	2.98	2.72	2.96	0.66
Teacher Unions' first priorities should be related to learning needs.	2.65	3.18	2.69	0.78
Teacher Unions' first priorities should be related to teacher needs.	3.08	2.53	3.03	0.75
Teacher Unions should be creating and advocating for systems of shared governance in K-12 schools.	2.97	2.87	2.96	0.64
Teacher Unions should encourage building level control over working conditions.	2.73	2.85	2.74	0.74
Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.	2.60	2.82	2.62	0.83
Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values.	3.33	3.62	3.36	0.55
Identification of common goals, beliefs and values should be the starting point for bargaining with school districts.	3.20	3.41	3.22	0.56
Teachers win when teacher Unions adopt militant strategies.	1.76	1.49	1.74	0.67
Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.	2.69	3.11	2.73	0.72
Teacher bargaining agreements should respond to the needs of districts.	2.80	3.16	2.83	0.65

SD = Standard Deviation

Table B.27. *Union Membership 3.*

Item	YES	NO	Total	SD
The Union should take a more active role in the quality control of teachers.	2.74	2.97	2.76	0.82
Teacher performance evaluations should be completed only by a building principal.	2.30	2.33	2.30	0.76
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	2.57	2.65	2.57	0.81
Peer review would solve problems with low performing teachers.	2.36	2.47	2.37	0.69
Peer review is appropriate for professional development.	3.00	3.10	3.01	0.62
Peer review is not appropriate for determinations related to contract renewal.	2.74	2.55	2.73	0.76
My classroom teaching strategies, methods, and organization are not the concern of my peers.	2.00	1.95	1.99	0.71
Teachers should be responsible for quality control of their peers.	2.23	2.45	2.25	0.72
Peer review has excellent potential for enhancing education.	2.98	3.12	2.99	0.65
Peer review programs may leave individual teachers feeling isolated or alienated.	2.75	2.63	2.74	0.73
New teachers need an induction program that includes a peer review component (e.g., mentoring).	3.47	3.48	3.47	0.57
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	2.85	2.92	2.86	0.69

SD = Standard Deviation

Table B.28. *Geographic locations 1.*

	1	2	3	4	5	Total	SD
Educators should be compensated for increases in student performance.	1.95	1.72	2.02	2.00	2.22	1.98	0.84
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.	2.73	2.72	2.65	2.73	2.42	2.68	0.73
Student performance provides objective criteria for pay-for-performance.	1.58	1.38	1.58	1.57	1.79	1.56	0.70
Standardized achievement test results are indicators of teacher performance.	1.48	1.44	1.54	1.60	2.00	1.56	0.69
I would be comfortable with my salary being tied to student performance.	1.33	1.37	1.59	1.59	1.83	1.55	0.76
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.	2.48	2.38	2.57	2.62	2.33	2.55	0.89
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc…).	2.78	2.61	2.72	2.80	2.83	2.75	0.86
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.	2.93	2.41	2.70	2.67	2.63	2.66	0.80
Teacher education level (graduate coursework, advanced certificates, etc…) should be used to determine educator salary level.	3.08	2.91	3.25	3.39	3.58	3.27	0.59
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.	3.55	3.20	3.37	3.42	3.50	3.38	0.56
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.	3.30	3.24	3.38	3.38	3.46	3.36	0.66

1 = Portland Metro, 2 =Willamette Valley, 3 = Southern Oregon, 4= The Coast, 5 = East-of-the-Cascades ; SD = Standard Deviation

Table B.29. *Geographic Location 2.*

	1	2	3	4	5	Total	SD
Bargaining Item #1	3.36	3.17	3.09	3.21	3.13	3.16	0.71
Bargaining Item #2	2.03	1.85	1.84	1.69	1.79	1.79	0.69
Bargaining Item #3	3.05	2.94	2.98	2.94	2.83	2.96	0.66
Bargaining Item #4	2.87	2.59	2.69	2.67	2.91	2.69	0.79
Bargaining Item #5	3.11	2.96	3.05	3.04	2.91	3.03	0.75
Bargaining Item #6	2.86	2.87	3.00	2.97	2.83	2.96	0.64
Bargaining Item #7	2.72	2.77	2.76	2.70	2.96	2.74	0.74
Bargaining Item #8	2.57	2.62	2.64	2.58	2.77	2.61	0.83
Bargaining Item #9	3.38	3.27	3.31	3.42	3.58	3.36	0.55
Bargaining Item #10	3.26	3.10	3.18	3.29	3.35	3.22	0.56
Bargaining Item #11	1.85	1.70	1.79	1.71	1.54	1.74	0.68
Bargaining Item #12	2.89	2.62	2.79	2.67	2.83	2.72	0.72
Bargaining Item #14	2.97	2.79	2.80	2.85	2.88	2.83	0.65

Note 1: 1 = Portland Metro, 2 =Willamette Valley, 3 = Southern Oregon, 4= The Coast, 5 = East-of-the-Cascades; SD = Standard Deviation Note 2: Items were coded as "Item #1, Item #" 2 to meet APA formatting requirements – to see what the items were see the complete item list in Appendix A.

Table B.30. *Geographic Location 3.*

	1	2	3	4	5	Total	SD
The Union should take a more active role in the quality control of teachers.	2.71	2.51	2.74	2.84	2.96	2.76	0.82
Teacher performance evaluations should be completed only by a building principal.	2.34	2.41	2.23	2.33	2.33	2.30	0.76
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.	2.64	2.47	2.60	2.58	2.25	2.57	0.81
Peer review would solve problems with low performing teachers.	2.39	2.27	2.35	2.41	2.25	2.36	0.69
Peer review is appropriate for professional development.	2.98	2.91	3.03	3.03	2.96	3.01	0.63
Peer review is not appropriate for determinations related to contract renewal.	2.64	2.89	2.71	2.71	2.61	2.73	0.76
My classroom teaching strategies, methods, and organization are not the concern of my peers.	1.90	2.09	1.98	2.00	1.88	1.99	0.71
Teachers should be responsible for quality control of their peers.	2.31	2.16	2.27	2.23	2.50	2.25	0.72
Peer review has excellent potential for enhancing education.	3.05	2.83	3.04	3.00	2.82	2.99	0.65
Peer review programs may leave individual teachers feeling isolated or alienated.	2.63	2.68	2.78	2.73	2.78	2.74	0.73
New teachers need an induction program that includes a peer review component (e.g., mentoring).	3.43	3.43	3.44	3.51	3.46	3.47	0.57
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.	2.82	2.83	2.94	2.82	2.79	2.86	0.70

1 = Portland Metro, 2 =Willamette Valley, 3 = Southern Oregon, 4= The Coast, 5 = East-of-the-Cascades; SD = Standard Deviation

Appendix C

Factor Analysis Results

Table C.1. *Factor Structure #1.*

Item	#1	#2	#3	#4	#5	#6	#7	#8	#9
Student performance provides objective criteria for pay-for-performance.	0.80								
I would be comfortable with my salary being tied to student performance.	0.78								
Educators should be compensated for increases in student performance.	0.66								
Standardized achievement test results are indicators of teacher performance.	0.66								

Table C.2. *Factor Structure #2.*

Item	#1	#2	#3
Peer review is not appropriate for determinations related to contract renewal.		-0.70	
Having a panel of master-teachers and administrators determine who is offered contract renewals (based on documented classroom observations) would be a powerful tool for employee growth.		0.59	
Inadequately performing senior teachers need a peer review program as a component of a plan of assistance.		0.56	0.31
Teacher performance evaluations should be completed only by a building principal.		-0.54	
Teachers should be responsible for quality control of their peers.		0.52	
Peer review would solve problems with low performing teachers.		0.47	0.33
The Union should take a more active role in the quality control of teachers.		0.31	

Note: no items loaded on factors four through nine.

Table C.3. *Factor Structure #3.*

Item	#1	#2	#3	#4	#5	#6	#7	#8	#9
Peer review has excellent potential for enhancing education.			0.74						
Peer review is appropriate for professional development.			0.64						
My classroom teaching strategies, methods, and organization are not the concern of my peers.			-0.47						
New teachers need an induction program that includes a peer review component (e.g., mentoring).			0.39						

Table C.4. *Factor Structure #4.*

Item	#1	#2	#3	#4	#5	#6	#7	#8	#9
Teachers should have opportunities to increase their earnings by taking on extra projects, assignments, or duties.				0.56					
I would be comfortable with my salary being tied to my duties outside of my regular classroom functions (e.g., lead teacher, curriculum development, etc...).				0.53					
Teachers who perform highly in extra duty assignments that benefit the school should be compensated for those added responsibilities.				0.46					
I would be comfortable with my salary being tied to my accomplishments such as obtaining National Board Certification.				0.36					
Teachers new to the profession should have options for advancing the salary schedules at a faster rate.				0.34					

Factor five is also a fairly straight forward factor of questions related to alternative bargaining strategies. It presents one item which negatively loads and had no cross-loading items. For a discussion of the implications of this factor, see chapter five. See Table C.5.

Table C.5. *Factor Structure #5.*

Item	#1	#2	#3	#4	#5	#6	#7	#8	#9
Teacher Unions should lead the way on educational policy issues such as NCLB, state-funding, class size reductions and issues of educational improvement.					0.67				
Teacher Unions should be creating and advocating for systems of shared governance in K-12 schools.					0.49				
Bargaining is a tool to establish sound policies.					0.48				
Teacher Unions should only bargain for economic necessities such as salary and benefits.					-0.46				

Factor six is more complicated and less discrete factor. There are items on this factor that merged into two other factors. Additionally, there was a negative factor loading. This factor deals with teacher beliefs around Union goals and priorities. See Table C.6.

Table C.6. *Factor Structure #6.*

Item	#1	#2	#3	#4	#5	#6	#7	#8	#9
Teacher Unions should work with school boards and administrators to identify common goals, beliefs and values.				0.32		0.57			
Teacher Unions' first priorities should be related to teacher needs.						-0.50			
Teacher Unions' first priorities should be related to learning needs.						0.48	0.31		
Identification of common goals, beliefs and values should be the starting point for bargaining with school districts.					0.36	0.44			

Table C.7. *Non-Loading Item.*

Item	#1	#2	#3	#4	#5	#6	#7	#8	#9
Teachers win when teacher Unions adopt militant strategies.									

Table C.8. *Factor Structure #7.*

Item	#1	#2	#3	#4	#5	#6	#7	#8	#9
Teacher bargaining agreements should be flexible documents that respond to the needs of buildings.							0.72		
Teacher Unions should encourage building level control over working conditions.							0.49		
Teacher bargaining agreements should respond to the needs of districts.							0.35		

Factor #8 is a complicated factor. For some reason a question from the peer review component has merged with two questions related to teacher beliefs about salary structures. See table C.9.

Table C.9. *Factor Structure #8.*

Item	#1	#2	#3	#4	#5	#6	#7	#8	#9
Teacher education level (graduate coursework, advanced certificates, etc...) should be used to determine educator salary level.								0.45	
Traditional salary structures based on years of experience and education levels are adequate for the teaching profession.								0.42	
Peer review programs may leave individual teachers feeling isolated or alienated.								0.36	

Factor #9 is not a solid factor. Essentially, one question has created its own factor structure due to the fact that it did not mediate any other responses and had a fairly normal distribution of responses. See Table C.10.

Table C.10. *Factor Structure #9.*

Item	#1	#2	#3	#4	#5	#6	#7	#8	#9
Teacher Unions have not utilized their collective power to advocate for real issues related to teaching and learning.									0.45

Appendix D

Personal Perspectives on the Topic of Unionism

As a young educator new to the teaching profession, I experienced the Union from an insider's perspective - understanding that perspective and history may be important for some readers as they try to understand how I chose this particular research topic. These early, formative experiences have become a part of my professional identity. It is important to elaborate on this identity through this disclosure process. Simply put, these formative experiences have informed my practice as a researcher on the teachers' Union and have shaped many of my personal beliefs about Unionism as they relate to public educators. It would be negligent and unethical as a researcher to hide these disclosures and not share my personal opinions and biases. Adopting a post-positivist perspective, as defined by Gall, Gall, and Borg (2007), I believe it is impossible to separate the researcher from the self; thus, the disclosures on my personal history with the teachers' Union appear here.

Briefly elaborating on research and epistemological perspectives, all researchers are products of their society and culture. Researchers are also informed by their own personal histories. Truly objective research is impossible (and not very interesting – who is the human behind the research?). However, with rigorous methods and, frank disclosures, a semblance of the truth can be uncovered and explored.

With that said, I would like to add that I believe good research starts with personal observations. These observations contribute towards a sense of richness and depth to the subject; they can bring a human quality to an otherwise sundry topic. I begin with my observations.

During my first year as a classroom teacher, I was asked to join the Union as a district-leader because of my interest in developing collaborative relationships in a school district that could be characterized as having a dysfunctional labor relationship. I was catapulted into a politicized role in a large school system as a leader in the teachers' Union. Ultimately this early leadership role contributed toward my pervasive beliefs that Unions are (a) important for the functioning of schools and (b) important for educational programs in K-12 settings. However, Unions are not without fault. These are my biases in simplistic terms.

During this first-hand experience with Union leadership, I was able to observe many interesting happenings that defied some of my early stereotypical beliefs about what a teachers' Union should (and should not) be. I was under the mistaken impression that teachers' Unions were only professional associations that did important work to contribute towards professional standards of the teaching profession. What I experienced was counter to that; yet, I have not given up on the idea that the teachers' Union is paramount to the educational process in the US.

As a young Unionist, I was shocked to find such militant and non-collaborative approaches from both the educators and administrators in charge of school programs. It seemed that each had their own set agendas; mutual goals were not seen as a possibility or even viewed as desirable. Collaboration was viewed as something to be tolerated in namesake only. Each party was only concerned with their own rights. According to Wagener (1991), this particular district and Union adopted an industrial perspective on labor relations. They propagated the belief that the Union and administration had competing and conflicting interests.

Having come from a more progressive graduate program in special education the prior year, I knew that this was not the way in which school districts and labor organizations should be working to create programs for children who need an education. After all, this way of organizing seemed antithetical to the strategies and theories on collaboration, relationship building, and positive school climate to which new teachers are exposed to and expected to understand. It seemed unprofessional to be so hyper-focused on disagreements and district political issues when curricular issues were largely being ignored.

Throughout the entire year on the leadership executive board, we never had one discussion about an issue related to students, learning, or educational programs. Further, I saw disagreements at the bargaining table seeping out into the actual day-to-day operations of the school district. Union leaders were targeted by administrators through the evaluation process; administrators were targeted by Union leaders through grievance processes. Professional, supportive relationships between management and teachers were virtually non-existent. From my perspective, it seemed that the teachers' Union and the management should have been setting out to deal with issues that affected educational programs that contributed towards the good of student learning. Rather, the Union and the management were spending vast amounts of time and energy in combative roles that were counter to the mission of public education. In my opinion, it was a waste of mental energy and tax-payer dollars. The militancy from both parties was entirely unnecessary.

After leaving that district and moving into a more progressive educational system, I continued my work with the Union. I decided not to put myself into

anymore politically-contentious situations as a young teacher without due process rights. I witnessed several teachers with more seniority get "burned" from their advocacy or differing opinions. So, I made my contribution to the Union in a low-key way: I became a building representative of the local chapter in a small school program with excellent labor-management relationships. There was no threat to my career for being involved in these Union activities. Labor issues were openly discussed; the shared focus between management and teachers was on the needs of learners.

Once I started working in this new role, I observed school based labor related phenomenon from a different perspective. I had the benefit of knowing how toxic labor relationships detrimentally influence the culture of a school system. Few would argue with the premise that toxic work environments and educational systems do not mix.

In my new position, I observed administrators and teachers collaborating on teaching and learning issues through the platform of the Union. The Union bargaining process was a place where open conversations about real teacher issues could be hammered out. Relationships were fostered and supported. The district had a collective sense of pride in positive labor relationships. The Union contract was viewed as important, not just a technicality that had to be followed. There were not open hostilities as a manner of course directed towards the labor ranks; conversely, there were not open hostilities from the labor ranks directed towards the administration. This was a different breed of Unionism; I was beginning to see that the Union could actually provide a place for problem solving and reform with serious issues related to teaching and learning issues.

These experiences led me to the personal belief that teachers' Unions and educational administrators are going to have to continue to find better ways of doing business together. It is my personal belief that Unions greatly contribute towards the overall efficacy and functioning of a school system in a number of ways. Thus, having Unions that enhance teaching practice and contribute towards the profession is paramount. Simply put, much reform is needed if the Union wants to maintain its positive powerful influence in the life of 21st century education. Hopefully, this personal disclosure helps frame the present study and serves to orient readers to my personal biases in the research process.

Appendix E

IRB Approval

TO: Darlene Russ-Eft
      Adult Education

IRB #: 3834 – An Empirical Analysis of Teacher Beliefs related to Post-Industrial Labor Reforms in K-12 School Systems

Level of Review: Expedited

Expiration Date: 1-29-09

Approved Number of Participants: 28,000

The referenced project was reviewed under the guidelines of Oregon State University's Institutional Review Board (IRB). The IRB has **approved** the:

(X) Initial Application   ( ) Continuing Review   ( ) Project Revision
**with a (if applicable)**: ( ) Waiver of documentation of Informed Consent   ( ) Waiver of Consent

A copy of this information will be provided to the full IRB committee.

- **CONSENT FORM:** All participants must receive the IRB-stamped informed consent document. If the consent is in a format that could not have stamp placement (i.e. web site language, email language, etc), then the language must be **exactly** as the IRB approved it.
- **PROJECT REVISION REQUEST:** Any changes to the approved protocol (e.g. protocol, informed consent form(s), testing instrument(s), research staff, recruitment material, or increase in the number of participants) must be submitted for approval before implementation.
- **ADVERSE EVENTS:** Must be reported within three days of occurrence. This includes any outcome that is not expected, routine and that result in bodily injury and/or psychological, emotional, or physical harm or stress.
- **CONTINUING REVIEW:** A courtesy notice will be sent to remind researchers to complete the continuing review form to renew this project, however – it is the researcher's responsibility to ensure that continuing review occurs prior to the expiration date. Material must be submitted with adequate time for the office to process paperwork. If there is a lapse in approval, suspension of all activity including data analysis, will occur.
- **DEVIATION/EXCEPTIONS:** Any departure from the approved protocol must be reported within 10 business days of occurrence or when discovered.

Forms are available at: http://oregonstate.edu/research/osprc/rc/humansubjects.htm.

If you have any questions, please contact the IRB Human Protections Administrator at IRB@oregonstate.edu or by phone at (541) 737-8008.

Elisa Espinoza Fallows

Date: 1-30-08

Elisa Espinoza Fallows
IRB Human Protections Administrator

Appendix F

Teacher Demographic Reports in Oregon

Table F.1. *Ethnic Breakdown and Gender Comparisons.*

Assignment	White	Black	Hispanic	Asian / Pacific Islander	American Indian / Alaskan Native	Total
Ethnicity						
Superintendent						
Female	29.6	0.0	1.0	0.0	0.0	30.6
Male	120.1	1.0	1.0	0.0	1.0	127.5
Assistant Superintendent						
Female	25.2	0.0	0.0	0.0	0.0	25.2
Male	28.5	1.0	1.0	1.0	0.0	31.5
Principal						
Female	442.2	15.0	8.0	7.8	3.6	483.0
Male	510.3	8.0	11.5	3.6	2.0	541.8
Assistant Principal						
Female	155.4	7.0	6.0	10.5	3.0	182.9
Male	278.8	7.0	16.5	4.5	2.0	310.3
Curriculum Director						
Female	470.6	8.0	10.5	2.2	2.8	509.7
Male	193.0	5.3	7.0	5.0	1.0	212.6
Librarian						
Female	299.4	5.0	2.0	3.0	1.0	311.4
Male	54.7	0.0	0.0	2.0	0.0	57.7
Psychology Staff						
Female	213.5	1.3	8.3	4.0	0.6	230.2
Male	75.1	0.0	0.0	0.0	1.0	78.1
Classroom Teachers						
Female	18,128.1	119.0	417.3	309.3	68.8	19,353.0
Male	8,253.9	78.5	221.3	131.3	29.0	8,850.1
Guidance Counselor						
Female	765.9	3.5	18.0	16.6	3.1	813.4
Male	277.0	8.5	9.5	6.0	0.0	304.0
Other Staff						
Female	401.4	3.0	6.0	8.3	4.0	468.2
Male	154.0	3.0	4.5	1.6	2.0	173.1
Totals						
Female	20,931.2	161.8	477.1	361.7	86.8	22,407.6
Male	9,945.3	112.3	272.3	155.0	38.0	10,686.6

NOTE: Provided by the Oregon Department of Education