

# Teacher Unions and Educational Reform:

## A Research Review

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*Great Public Schools for Every Student*



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The National Education Association is the nation's largest professional employee organization, representing more than 3 million elementary and secondary teachers, higher education faculty, education support professionals, school administrators, retired educators, and students preparing to become teachers.

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Unions have a long and proud history of leadership in our country. They have served as a powerful force for change, providing support for women’s suffrage, Civil Rights, and other social movements. Unions have also broadened the scope of professionalism for teachers and education support professionals, while also securing the rights and benefits of those who dedicate themselves to serving students.

In recent years, however, the long-standing mission of unions to advocate for students and members has been challenged, and the progressive role of unions in reshaping public education has been misinterpreted or ignored altogether.

In an effort to reaffirm the strong commitment of teacher unions to the success of public schools, the NEA commissioned a review of the research literature on the role of unions in educational reform. Indeed, while the constructive role of unions in educational reform is well-documented and far-reaching, this review specifically illuminates the array of initiatives undertaken to improve the quality of teaching and learning in our increasingly diverse and global classrooms.

The review examines the misperceptions of the public, media, and policy makers who accuse teacher unions of interfering with school success through collective bargaining and other actions. It also explores specific ways teacher unions have had an impact on educational reform through partnerships and initiatives to benefit both teachers and students. Despite challenges from the outside and within, this review confirms that teacher unions have maintained a strong presence in the movement toward a more equitable and productive system of public education.

It is our hope that this review of the role of teacher unions in educational reform will help clarify the perceptions of the past and present, and serve as a basis for further expanding the engagement of unions in future reform initiatives.



Dennis Van Roekel  
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## Executive Summary

**T**eacher unions are a sizeable force in the public education sector of the United States. They have been around for well over one hundred years. While the scope of collective bargaining rights has increased over time, teacher unions' ability to effectively advocate for teachers specifically, and for educational quality more generally, has been subject to political challenge. In many places, the news media and the public hold images of teacher organizations as militant, unprofessional, simplistic, and selfish in their priorities. In recent years, large-scale federal policies such as No Child Left Behind and Race to the Top have undermined the strength of collective bargaining. The intensity of recent condemnations has caused teacher unions to take a number of different approaches: reacting defensively, accommodating to reform initiatives proposed by others, developing partnerships with education officials, and forging new reform directions of their own.

For the past few decades, most governmentally driven educational reforms have been characterized by a commitment to broad state- or national-level initiatives. Educational policy has become increasingly centralized; this and a "triage" approach to educational improvement represent significant changes in how teacher unions must operate. It has become more difficult for union staff and officials to establish credibility and work proactively within the educational policy system. According to teacher union critics, collective bargaining is a particularly significant threat to current reform efforts. According to some policy researchers, marginalization is in fact a goal of many of these reform efforts. Meanwhile, teacher unions have become a (perhaps *the*) major spokesperson for public schools and are the key defenders of the American system of public education.

In contrast to the portrayal of self-serving unions advocating for teacher benefits at the expense of student learning, some researchers paint an evolving picture of unions as organizations committed to strengthening the teaching profession and improving the quality of education. Many unions have adopted the "new unionism," a more collaborative approach to collective bargaining emphasizing the importance of increasing the scope of unions' role in decision making to include professional and reform agendas. While partnering with education officials is a common strategy for teacher unions committed to educational reform, at other times teacher unions act independently or are the major actors in reforms supported by other organizations.

One of the most common examples of teacher union-initiated reform is the provision of professional learning opportunities for teachers. Some teacher organizations argue that it is the school system's responsibility to support teacher work, but an increasing number of teacher unions have jumped in to fill gaps in support. Many partnerships

have focused on developing Peer Assistance and Review (PAR) programs that combine mentoring programs for novice teachers with intervention programs for experienced teachers to improve the quality of teaching. Some teacher unions have gone into the technical support business. Launching media campaigns in support of public education has become a common practice of teacher organizations. Another way that teacher unions support educational reform is by serving as test beds for initiatives developed by teachers based on their own perceptions of missing educational practices.

Forming a partnership and making recommendations may prove to be much easier than actually implementing new ideas. Re-conceptualizing the role of teachers in the arena of educational decision making requires a significant paradigm shift. Leadership is crucial in maintaining and supporting positive working relationships within partnerships. Unions themselves also contribute to the fragility of such alliances.

Successful, enduring teacher organizations seem to share particular organizational characteristics. There is much that can be done—

- by tending to their own organizational priorities, priorities that arise out of member needs;
- by ensuring that they are flexible, can manage a comprehensive array of programs, and are internally coherent; and
- by finding ways to express a different, more productive message about teaching and schooling.

In the process, teacher organizations can provide a new discourse through which educators and the public can understand the workings of the educational enterprise more fully and with greater empathy.

## Overview

**T**eacher unions are a sizeable force in the public education sector of the United States. In the first decade of the 21st Century, the National Education Association (NEA) and American Federation of Teachers (AFT) accounted for about three-quarters of the 5.5 million non-supervisory professional staff employed in U.S. elementary and secondary education (Henderson 2004). Both organizations operate at multiple levels—federal, state, district, and school—and thus are able to speak for teachers’ interests at all levels of educational governance. Because of the different ways the NEA and AFT are organized, the NEA’s strength lies in its state affiliates while the AFT’s strength resides in its local affiliates. This contrast causes the two organizations to operate differently and to take on different political agendas. Local collective bargaining is the formal right of teachers in roughly two-thirds of the 50 states (as of this writing). Even in states where it is not a legal right, unions participate in informal bargaining on teachers’ behalf at the local level and lobby at the state level with respect to educational issues.

Teacher unions have been around for well over one hundred years. The earliest form of the NEA goes back to 1857, and the first local branch of what became the AFT came into being in 1897. Both organizations found their footing with the emergence of the systems of mass education we know today around the turn of the 20th Century. Educational organization designers established these systems on the basis of “scientific management” principles borrowed from business and military organizational concepts, particularly hierarchy and bureaucracy. Within these systems, educational administrators asserted their authority over teachers by claiming special “scientific” expertise they claimed teachers did not have (Gitlin 1996, Larson 1977, Tyack 1974, Urban 1982). Teacher bargaining rights initially grew out of demands for protection from arbitrary or sexist treatment by administrators (Strunk and Grissom 2010). During the 20th Century, America’s public education system became larger and more standardized, which resulted in the rise of the teacher labor movement first in the 1930s in major urban centers and then in the 1960s in 32 states when teachers started working to pass collective bargaining legislation (Cooper and Sureau 2008). However, maintaining or improving teachers’ status, especially in contexts where state governments control many aspects of educational practice, has been and continues to be an ongoing struggle (Bascia 2003 and 2009).

As the number of teacher associations engaging in collective bargaining expanded throughout the latter half of the 20th Century, so did the scope of rights, protections, and benefits contained within collective bargaining agreements. Class size limits, mandated evaluation procedures, and a guaranteed voice for teachers in school-wide curriculum decisions became common provisions (Eberts and Stone 2004, McDonnell and Pascal 1988). So did rules about how staffing decisions can be made, about preparation time for

teachers, and about how often professional development sessions can occur (Johnson and Donaldson 2006). However, even while policy researchers have noted the tendency for collective agreements to grow—not shrink—over time (Strunk and Grissom 2010), the massive size of the educational undertaking, coupled with perennial ignorance of teachers' occupational needs, has resulted in a situation where the quality of teachers' working conditions is particularly sensitive to erosion. This erosion is also the result of the unpredictability of educational funding and frequent changes in policy directions, as newly elected political leaders each attempt to assert their influence on the educational enterprise (Bascia 2009).

Teachers and administrators  
are largely ignorant about the  
potential value of unions.

Teacher organizations have not always fit easily into the educational landscape. State governments, which possess formal constitutional authority over educational policy, control their involvement in educational decision making; their involvement in local and state decision making can be legislatively redefined at any time. In many states, their purview is restricted to an advisory role with respect to substantive policy issues; the concerns in which they could claim some legitimate involvement through collective bargaining have been salary, benefits, and working conditions, but their ability to negotiate even in these areas can be and is restricted to a shrinking range of issues both because of reduced funding and by legislation (Bascia 1994 and 1998a). Teachers and administrators are largely ignorant about the potential value of unions; only a minority engages in organizational activities, and their work is largely invisible to others (Bascia 1997). In many places, the news media and public hold images of teacher organizations as militant, unprofessional, simplistic, and selfish in their priorities (Bascia 1998b). And, in recent years, large-scale federal policies such as No Child Left Behind and Race to the Top have undermined collective bargaining's strengths (Krisbergh 2005).

These tendencies are not unique to the U.S. Research on global educational trends notes how a broad trajectory of government restructuring initiatives has had an impact on schooling generally and on teaching specifically. It describes how globalization has directly impacted education in terms of funding and regulation. Changes in economic dynamics worldwide have resulted in reshaping the workforce and led to new curriculum initiatives with serious consequences for teachers and students. Changes in patterns of governance have reduced spending on social services while cutting back on a range of public provisions and fomenting the privatization of others (Compton and Weiner 2008, Robertson 1996, Robertson and Smaller 1996).

Over the past three decades or so, criticism of American teacher unions has increased. At the same time, teacher unions themselves have been attempting to enhance their involvement in and influence over educational reform. The intensity of recent condemnations has caused teacher unions to take a number of different approaches: reacting defensively to criticism, accommodating to some new reform initiatives, developing partnerships with education officials, and forging new reform directions of their own. In order to make sense of these different approaches, we make use of typologies developed by two teams of union researchers to characterize relationships between teacher unions and educational reforms.

In their comprehensive assessment of U.S. teacher union activity with respect to educational reform in the 1980s, McDonnell and Pascal (1988) suggest that unions could

take three possible stances toward reform: they could *resist* policies and policy proposals developed by others; they could adapt to new circumstances and *accommodate* various reform options; or they could play an active role in *shaping* new policy approaches. In their study of teacher unions' relationships with the U.K. government in the 2000s, researchers Carter, Stevenson, and Passy (2010) also identify three possible approaches. The first, *rapprochement*, "refers to those teacher union strategies that go with the grain of the new [government] educational agenda and seek to maximize gains for their members within that." The second "may be best described as *resistance*: teacher union strategies that actively seek to challenge the trajectory of [new] neo-liberal restructuring in education." The third, *union renewal*, suggests an entirely new approach to reform by teacher unions that both takes into account changing political conditions and is more proactive (Carter *et al.* 2010).

In this review of the literature, teacher unions are seen to adopt each of these positions. The next section of this review, "Reform without Teacher Unions," describes the difficulty in which American teacher unions find themselves in the current era of attacks on public education and on teachers—conditions that exacerbate unions' tendencies toward resistance and illuminate circumstances where resistance alone does not appear to be a sufficient approach. The section, "Teacher Unions' Reforms," describes the reform strategies unions have undertaken, both in partnership with educational officials and others and independently. The union approaches described in this section represent a combination of accommodation and active policy making. The subsequent section, "The Good Union," describes the features of teacher unions involved in reform over a sustained period of time. A concluding section provides "Recommendations for American Teacher Unions."



## Educational Reform without Teacher Unions

For the past thirty years, most educational reform has been characterized by a commitment to broad state or national government-level initiatives (Urban 2004). Educational decisions that, in many states, previously had been made at the school or district level (such as on budgetary spending) and had been based on factors related to the conditions of teaching and learning (such as class size) have evolved into decisions made centrally, at the state or even national level (Bascia and Rottmann 2011). These reforms have increasingly emphasized curriculum standards, accountability measures, and mandates rather than capacity building. Tighter educational budgets and the centralizing tendencies of system reform have resulted in fewer resources, in less program diversity and experimentation, in an emphasis on traditional roles and activities for educators (teachers teach, administrators evaluate), in reporting systems that emphasize accountability rather than bi-directional or lateral information sharing, and in an infrastructure that is lean on support for teaching as daily practice. Both the centralizing tendency of educational policy making and this “triage” approach to reform are significant changes in how and what teachers teach and in how teacher unions must operate (Bascia 2003).

The most common public expectation for teacher unions is that their priorities are consistent with prevailing policy. When they are not, they are viewed as outmoded. When they take up reform initiatives of their own, they are seen as overstepping their rightful roles. When they raise concerns about the adequacy of support for teaching, they are viewed as irrelevant and out of touch with what really matters. These impressions make it difficult for union staff and officials to establish credibility and work proactively within the educational policy system (Bascia 2003).

When unions take up their own reform initiatives they’re seen as overstepping. When they raise concerns about the adequacy of support for teaching they’re viewed as out of touch.

### Collective Bargaining

According to teacher union critics, the most significant threat to current reform efforts is collective bargaining. Some researchers have demonstrated that labor relations tend to be influenced by non-contractual factors such as administrative leadership, staff allegiance, and student needs (Bascia 1994, Johnson 1983 and 1984, Kerchner and Mitchell 1986), but it remains a common belief that union presence inhibits reform by restricting the actions of district and school administrators. Another line of research, critical of collective bargaining, claims that administrators in districts with powerful unions have less flexibility to adjust district policies to meet the demands of increasing accountability pressures (Strunk and Grisson 2010). Some research is intended to reassure administrators by

claiming that collective bargaining agreements don't necessarily have to impede reform because many provisions are flexible or simply ambiguous (Price 2009).

Collective bargaining has been directly challenged by recent reform initiatives including No Child Left Behind (NCLB) and Race to the Top. Statements by government officials imply that newly negotiated teacher contracts must be compliant with NCLB. The federal government has begun to help districts preserve some measure of policy flexibility by regulating contracts more closely or by mandating that some areas of district authority may not be given away in the negotiation process. More recent Race to the Top guidelines provide incentives to state and district policymakers to establish greater freedom from restrictive policies traditionally found in teacher union contracts (Strunk and Grissom 2010). NCLB allows teachers in a school that fails to meet certain academic benchmarks, or "adequate yearly progress," for four consecutive years to be removed, despite the fact that the teachers face no individual charges of misconduct or other cause for dismissal. These removal provisions run headlong into the just cause provision in teachers' contracts of employment (Krisbergh 2005). Making it easier to fire teachers is not a reasonable focal point of a strategy for raising school performance (Jacoby 2011).

### **Public Antipathy: Are Unions Villains or Heroes?**

Changing economic conditions during the 1970s and 1980s and the economic downturn following the technology boom of the 1990s have created a crisis for public schools in general and for teacher unions in particular. Since the late 1970s, voters and the business community have been seeking to reduce taxes, limit government expenditures, or both. In addition, school enrollments declined after the baby boom and fewer voters had an immediate stake in public or urban schools. However, as inflation, changes in the composition of student populations, and other factors took hold expenditures did not decline proportionally. As a result, during the 1990s and into the 21st Century, public education has faced increasing pressure from conservative politicians and well-funded interest groups intent on reducing public funding for education through privatization of public schools (Henderson 2004).

Public antipathy has fallen particularly on teacher unions as the findings of some recent studies have percolated into the public media—a study that suggested, for example, that unions raise costs and increase high school dropout rates; another that claimed that contracts and unions impede school performance and reform initiatives (Cooper and Sureau 2008). Teacher unions have repudiated all of these claims by citing different studies.

The press is more likely to view teacher unions critically than positively or even neutrally.

Yet a recent review of reporting by major news sources found that the press is much more likely to view teacher unions critically than positively or even neutrally (Goldstein 2011). The recently released documentary, *Waiting for "Superman,"* attributed many of the inequities in public schooling to teacher unions. The media's demonization of teacher unions undermines their public credibility and, in some senses, pits the public against teachers. Overall, the media and government officials' bashing of teacher unions has led many citizens to view them as obstacles to educational reform at best and as obsolete at worst (Young 2011). Discontent with public schools in general and teacher unions in particular has fueled interest in reforms such as vouchers, charter schools, teacher "pay for performance" plans, and a myriad of school accountability proposals and initiatives (Eberts, Hollenbeck, and Stone 2004).



Meanwhile, teacher unions have become a (perhaps *the*) major spokes-group for public schools and the key defenders of the system at all three levels of government: federal, state, and local. Unions, it seems, are ultimately at work to support and defend public education, not to destroy it as many opponents of unionization and unions have been arguing (Cooper and Sureau 2008). Some researchers have come to the defense of teachers and their unions. For example, Jacoby (2011) maintains that many of the problems associated with public education, such as so-called “achievement gaps,” derive from factors largely outside teachers’ control, and that no genuine conversation can begin with the presumption that unions are responsible for all of schooling’s shortfalls. Goldstein’s (2011) research demonstrates how the media’s representation of teacher unions as bullies (and against hope) ignores the long-standing struggles for access, equity, and justice in which the unions have participated.

In accordance with the view of teacher unions as an obstruction, even more than in the past, teacher unions have found themselves completely out of the policy making process (Bascia 2009, Urban 2004). According to some policy researchers, this marginalization is in fact a goal of many of these reform efforts. For example, Krisbergh (2005) argues that market-based models of educational reform are aimed at breaking the monopoly of teacher unions and unbinding education from the collective bargaining agreements between school administrations and teachers. One significant consequence of teachers’ absence from the policy making arena is that most reforms rolled out by government lack consideration of the conditions that shape the quality of teaching and learning. Indeed, educational decision makers often view teaching conditions as being in *competition* with student learning in a zero sum resource environment (Bascia and Rottmann 2011). In response, both the NEA and the AFT have expressed their opposition to many centralized education policies, which has led critics to attribute “many of the ineffective and inefficient practices in education to teacher unions’ unwillingness to alter their bottom line” (Young 2011). The media has framed school reform as a process that must occur outside the realm of teachers and unions, suggesting that they cannot be trusted to do what is just and right. “Teachers and their unions must be told what to do because, left to their own devices, they will cut a swath of destruction through students, because they are lazy, incompetent, abusive, and, above all, a threat to the American public” (Goldstein 2011).

Unions are at work to support and defend public education, not destroy it as many opponents argue.

A consequence of teachers’ absence from the policy arena is that most government reforms lack consideration of conditions that shape the quality of teaching and learning.



## Teacher Unions' Reforms

In contrast to the portrayal of self-serving unions advocating for teachers at the expense of student learning, some researchers describe teacher unions as organizations committed to strengthening the teaching profession and improving the quality of education more generally (see Bascia 1994 and 1998b, Murray 2004). Much of teacher unions' work toward educational reform is hidden behind the prevailing anti-union rhetoric but, since the late 1980s, many locals of both the NEA and the AFT have moved away from an exclusive emphasis on traditional collective bargaining provisions, adopting a more progressive and proactive style in their negotiations (Johnson *et al.* 2007) and initiating a range of reforms, sometimes in partnership with education officials and others and sometimes independently.

### Unions as Reform Partners

Many unions have adopted the “new unionism,” a more collaborative approach to bargaining, that emphasizes increasing the scope of their role in decision making to include professional and reform agendas (Urban 2004). However, in spite of the notion that the new union agenda would “empower and enable teachers as full partners in school reform” (Eberts *et al.* 2004), forward-thinking unions that adopt this paradigm often find themselves challenged to counter negative relationships resulting from years of tension between education officials and teacher unions. Thus, within the current constrictive policy environment, and possibly even because of these challenging political conditions (Bascia 2008), a number of local and state unions are re-conceiving the labor-management relationship through diverse partnerships with various educational decision makers. For example, in Bascia's (2003) case study of teacher union reform efforts, attempts to establish positive labor relations appeared to be the norm as teacher unions increasingly worked strategically with others in the education system to initiate and sustain reform. Likewise, in Johnson *et al.*'s (2007) study of teacher union presidents, less than one-fourth characterized their union's negotiation approach as traditional and adversarial.

Attempts to establish positive labor relations appear to be the norm.

While the new unionism represents a genuine dedication to educational improvement, partnerships also have been formed to preserve teacher unions' influence in educational policy as top-down bureaucratic control of education has become even more prominent (Compton and Weiner 2008). Faced with an onslaught of reforms that will happen with or without them, some teacher unions use the new unionism to expand their reform agenda to include concerns that go beyond traditional bread-and-butter issues while simultaneously increasing their organizational capacity, brokering for

additional resources, and enhancing the role of the union in determining district or state policy (see Bascia 2009, Murray 2004, Pringle 2010).

Partially funded by public education jurisdictions, private foundations, or some combination of the two, reform-minded unions have partnered with a variety of education stakeholders including legislators, administrators, academics, parents, community members, and business representatives (Bascia *et al.* 1997). Most union partnerships focus on enhancing unions' role in local policy making or in examining the impact of contract provisions and work conditions on local education programs. The main players in these partnerships are usually district-level boards of education or sometimes school site administrators. There are many individual cases; there are also networks of individual cases, such as the Trust Agreement districts in California (Bascia 1994); NEA's Learning Laboratories across the U.S. (Bascia *et al.* 1997), and TURN (Teacher Union Reform Network) (Murray 2004).

The nature of the issues explored and the strength of the working relationship developed vary across contexts.

Although there are commonalities among successful partnerships, the nature of the issues explored and the strength of the working relationship developed vary from one context to another. In some instances, partnership focuses on systemic change through the development of programs and projects designed to reshape educational practice. In other cases, reform serves as a springboard for changing the nature of local labor relations, and the reform's content is secondary.

### **Unions Reforming on their Own**

While partnering with education officials is a common strategy for teacher unions committed to educational reform, partnerships do not represent the sum total of unions' reform activities. At other times, and in relation to other kinds of reforms, teacher unions act independently—or are the major actors in reforms supported by other organizations. Why, and when, would teacher unions choose to institute reforms on their own?

A desire to demonstrate their professionalism is one motive for teacher unions' independent reform activities, but public optics is not the only or even the most important purpose. The motivation for teacher unions' autonomous reform work also arises from a recognition of several related factors: that supports for teaching and learning are not forthcoming from the education system; to fill gaps in educational infrastructure when and where educational conditions have deteriorated; and in response to acute attacks by government officials or others. Working independently enables teacher unions to focus on the content of reform rather than on negotiating reform and relationships with others. Autonomy provides greater flexibility and speedier turnaround than do jointly sponsored reforms.

### **The Content of Teacher Union Reform**

There are overlaps between the kinds of reform initiatives undertaken by partnerships and those that teacher unions undertake independently. Again, the difference appears to be whether the primary purpose of the reform initiative is working on the partnership or on the reform itself. One of the most common examples of teacher union-initiated reform is the provision of professional learning opportunities for teachers, particularly when such opportunities have shrunk or are in some way inadequate in helping teachers work

effectively in challenging circumstances. And where states and districts have focused their professional learning resources on improving teachers' classroom performance narrowly, in relation to mandated instructional practices, unions have expanded their array of professional development offerings to help teachers, principals, parents, and other educational partners understand and interact more effectively in the broader education milieu (Bascia 2003 and 2008b).

Some teacher organizations argue that it is the school system's responsibility to sustain teachers' work, but an increasing number of teacher unions have jumped in to fill gaps in support. For example, in the 1990s the United Federation of Teachers (UFT) in New York City managed a wide range of projects and priorities to enhance the resource capacity of the city's education system and to improve teacher quality. Many UFT staff had responsibility for projects aimed toward marginalized students, schools, and programs, including special education students and schools on state probationary review. A "Teacher Center" initiative trained teacher-facilitators and placed them in low-performing schools to develop comprehensive curriculum and teaching improvement projects. Several initiatives supported parents improving their ability to support their children's schoolwork (Bascia 2003).

Many partnerships have focused on developing Peer Assistance and Review (PAR) programs that combine mentoring for novice teachers and intervention for experienced teachers to improve the quality of teaching. One of the first of these programs developed was the Toledo Plan, which pairs new interns with consulting teachers, defined as educators with outstanding teaching service of at least five years who are released from regular classroom duties for three years at a time (Murray 2004). Struggling teachers, regardless of experience, are also placed with consulting teachers who counsel them and report on their progress. Similar initiatives have been adopted in a number of jurisdictions, including Seattle's STAR (Staff Training, Assistance, and Review program) and Rochester's Summative Appraisal (Murray 2004). In a slightly different approach, the union in Pittsburgh has partnered with the district to introduce RISE (the Research Based Inclusive System of Evaluation) where individual teachers co-facilitate their evaluations with their administrators, "both collecting evidence on four teaching domains across the school year: classroom environment; planning and preparation; professional responsibilities; and teaching and learning" (Hamill 2011). Other partnerships have revolved around creating new and innovative professional development opportunities such as the Toledo Career Development Plan, where outstanding teachers identified through PAR can apply to work on district projects relating to curriculum, leadership, or other self-identified areas of interest (Murray 2004). Further professional development collaborations include Pittsburgh's teacher-written curriculum initiative (Hamill 2011) and Rochester's Career in Teaching Program (Murray 2004).

In addition to providing professional learning opportunities, some teacher unions have gone into the technical support business. For example, Alberta, Canada's Teacher Association (the ATA) perceived gaps in provincial support for teaching and schooling as opportunities to challenge the provincial government's "triage" position. Supporting the government's interest in site-based decision making but finding neither models nor technical assistance forthcoming from Alberta Learning (the provinces' department of education), the ATA developed information packets and professional development strategies for

An increasing number of teacher unions have jumped in to fill gaps in support.

schools. When the government mandated individual growth plans for teachers, it was the ATA that became the official source of information by seeking and winning the contract to develop workbooks and train administrators on their use, essentially defining the purpose and content. When the province legislated school councils in 1995, the ATA chose to support the plan and, with the assistance of other stakeholders, developed the official resource manual and provided meaningful training for school council participants, ultimately determining the shape of the reform (Bascia 2008a).

Launching media campaigns in support of public education has become a common practice of teacher organizations in the U.S. and Canada, starting with the NEA (Bascia 2008b). Using various mediums such as white papers, research symposia, social networking like Facebook and Twitter, and television and radio ads, these unions are making their voices heard, highlighting their involvement in a variety of educational ventures, and counteracting the image of unions as being out-dated perpetrators of the status quo. In rebuttal to negative reports on the sorry quality of teaching released by Alberta Learning, the ATA initiated an ongoing, multi-level media campaign. It established a Public Education Action Centre in 1995 to develop a proactive campaign to mobilize teachers in grassroots activities, to promote positive changes in education, and to build effective coalitions (Bascia 2008b, Flower and Booi 1999). The ATA's plan is noteworthy in that it operated at all levels—provincial, district, and school—and galvanized educators to find ways to demonstrate their work to local communities.

Some teacher unions have assumed the responsibility of conducting research on various educational practices. For example, at the state level the Washington Education Association (WEA) not only conducts research for its members—and not only with respect to collective bargaining—it has also established a database to track variations across districts and over time on local factors such as resource allocations (Bascia 2003). Federal- and state-level NEA affiliates have been conducting research for local use in bargaining for many years, and, since the 1990s and along with the AFT, have worked on several initiatives to provide teachers with access to user-friendly research and development results (Vinovskis 2004).

Teacher unions support education reform by serving as test beds for initiatives developed by teachers, based on their perceptions of missing educational practices.

Another way teacher unions support education reform is by serving as test beds for initiatives developed by teachers, based on their perceptions of missing educational practices. For example, working within their unions teachers have developed curriculum units, new strategies of professional learning (such as school-based professional learning and teacher induction programs), and new student supports (such as peer mediation and conflict resolution). By sponsoring and supporting teacher-led initiatives, teacher unions contribute to educational renewal by supporting the development of new practices—some of which find their ways into common practice and may even become enshrined in policy (Bascia 2000 and 2009).

Partnerships between teacher unions and districts can be thought of as reforms in and of themselves. Still, collaboration within these partnerships tends to be limited to “professional issues” of new unionism while “bread-and-butter” issues like class size and workload remain the purview of traditional collective bargaining. One exception, however, is teacher compensation and salary scales, where a number of unions have

partnered with management to develop pay plans tied to teaching standards and evaluation. In Cincinnati, for instance, a new pay scale was adopted in 2002 based on five career categories ranging from interns to accomplished teachers based on a set of career accomplishment criteria (Murray 2004). Similarly, the Denver Classroom Teachers Association worked with the Board of Education to develop a pay-for-performance program that was adopted in 2005 (Mead 2006). Upon critical examination, however, it appears that collaborations focused around salary could be described as union accommodation in order to maintain some level of input into policies that will happen whether the union has a voice in them or not. In some instances, these negotiations can be viewed as capitulation to secure other partnership issues. Unions in these sorts of lopsided arrangements may find themselves struggling to represent the needs of members against the balance of maintaining a good relationship within the partnership.

### Partnership Perils and Promises

While a number of teacher unions have attempted to move in the directions described above, only a few have been successful in creating an environment that truly fosters the sorts of genuine partnerships that can result in large-scale, sustainable reforms. In most cases, forming the partnership and making recommendations prove to be much easier than actually implementing the ideas. As pointed out by Johnson *et al.* (2007), “Moving beyond industrial unionism is not easy both because it requires changes in culture and rules and because it demands ongoing leadership by both labor and management at all levels.” While the nature and function of every partnership is different, the struggles encountered by those involved can be thought of in terms of three overarching issues: limited internal capacity, leadership positions, and the presence of the principles of the new managerialism and the neo-liberal agenda.

Through the increased influence of their unions, collaborative partnerships reconceptualize teachers’ involvement in educational decision making. This requires a significant paradigm shift away from the idea that good teaching is a matter of compliance in order to move towards an acceptance of teachers as change agents. However, fostering that change is an arduous task, to say the least. With traditional authority structures firmly planted within the current education landscape, union partnerships continue to operate within a system whose foundations were not designed to support collaboration and workable change. In many cases, the success of partnerships has been limited by the influence of fragmented, externally mandated reforms that operate in direct opposition to the collaborative goals laid out by the partnership (Bascia 2003). In extreme instances, the presence of imposed school district or state requirements has actually taken over the partnership, sidelining the original purpose and becoming the new focus (Bascia 1996). Even union leaders who have benefited from positive and productive collaborations are quick to point out the fragile nature of such alliances (Bascia 2003, Bascia *et al.* 1997). Furthermore, as discussed above, most partnerships address professional issues; financial support for reforms such as mentors and professional development “have been amongst the first components of reform to disappear from school budgets when economic times have gotten tight” (Murray 2004).

Only a few teacher unions have succeeded in creating an environment that truly fosters the sorts of genuine partnerships that can result in large-scale, sustainable reforms.



Leadership is crucial in maintaining and supporting positive working relationships within partnerships, but collaborations between unions and districts appear to be based on individual leader's personalities.

Leadership is crucial in maintaining and supporting positive working relationships within partnerships. It is leaders who use their political acumen to contribute important items to the agenda and secure support from the broader assembly for reform initiatives. Leaders' personal philosophies of education and their level of commitment to collaboration are crucial to the sustained growth of a partnership. Unfortunately, many collaborations between teacher unions and districts appear to be based primarily on the personalities of individual leaders rather than on organizational norms (see Bascia *et al.* 1999, Bascia 2003, Johnson *et al.* 2007). While charismatic, dedicated leaders can contribute to a partnership's success, changes in leadership can have serious consequences, especially if new leaders' interests do not align with the interests of existing collaborations. For instance, in Bascia's (2003) examination of the work of six teacher unions, two struggled with partnerships that were wholly based on the work of one union leader's relationship with a single decision maker. In one site there was frank acknowledgement that the positive relationship would not likely outlast their tenure. Likewise, several Learning Lab initiatives came to a full stop after the appointment of a new superintendent, while others were merged with new projects or lost momentum because of conflicts between new players (Bascia *et al.* 1997). Union presidents interviewed by Johnson *et al.* (2007) also spoke openly about the importance of their working relationships with superintendents, stating that "if that relationship fails, little else will work."

As with changes of superintendents, new union leaders can have a significant impact on the nature of collaborations.

Unions themselves also contribute to the fragility of such alliances. One specific concern relates to the sometimes short and limited terms of union presidents, which may run for only one to two years with few or no renewals. As with changes of superintendents, new union leaders can have a significant impact on the nature of collaborations as they struggle with the steep learning curve of their new roles and responsibilities. Their personal histories and past labor-management experiences can set a new tone within a partnership that may not be in tune with existing operations. Secondly, if unions are to form successful partnerships they must possess the internal capacity to foster broad organizational learning and avoid relying on the skills of a single enlightened leader.

It is easy for teacher organization staff to lose touch with educational practice, and it is all too common for teacher unions to focus on the needs of one group at the expense of another. For instance, the Birchwood Education Association (Bascia 2003) illustrates how a single group of teachers, in the leadership for many years, can create a chasm within the membership that makes partnering with external agencies difficult. Unions that pay careful attention to intra- and inter-organizational dynamics and maintain a balance between the differing priorities of special interest groups are much more likely to foster the internal mutual respect necessary to building good relationships externally, relationships that allow them to stay true to the needs of their membership. Those unions that are unable to achieve this are much more likely to experience the pitfalls of partnerships where accommodation and capitulation are more routine than collaboration.

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In that sense, while some advances have been made in terms of relinquishing the old adversarial lines of communication between unions and decision makers, much of the literature “reveals the fragility of these new arrangements and the enduring, intractable nature of some major union concerns” (Bascia 2003).



## The Good Union

There are many cases in the research of teacher unions operating in partnership with education officials, but few examples of teacher unions having taken a proactive reform stance on their own (but see Bascia 2008a and 2008b). Whether working alone or in partnership, however, successful, reform-minded teacher organizations seem to share particular organizational characteristics. While there is little that unions can *directly* do to minimize the challenges they face from the external environment, there is much they can accomplish by working on reform from the inside out—that is, by finding ways to express a different, more productive message about teaching and schooling and, in the process, providing a new discourse by which educators and the public can understand the workings of the education enterprise more fully and with greater empathy rather than reacting directly to a perceived external threat; by tending to their own organizational priorities arising out of member needs; and by ensuring that they are flexible, can manage a comprehensive array of programs, and are internally coherent.

Successful, reform-minded teacher organizations share particular organizational characteristics.

### Leadership Messaging

Confronted with a diversity of goals and values among members and unskilled at managing conflict, union leadership may become autocratic and authoritarian. Participatory decision making structures may become mere window dressing, their agendas and procedures manipulated, while real decision making rests in the hands of a small number of people or even one individual. Squashing or hiding conflict, of course, does not eliminate it, but it does send a signal to teachers that the union is not accessible to everyone, and it reduces the information and ideas available to staff as they do their work on teachers' behalf (Bascia 2008a).

Facing hostility from the education system and a growing number of demands from their members for support, many unions adopt a triage approach, choosing to mount a small-number- or even a single-agenda priority in order to ration scarce organizational resources (Bascia 2003). But focusing on a narrowed agenda—like securing salary increases for teachers, resisting reform, or demonstrating “reform mindedness” by promoting a single educational innovation—usually backfires. Both teachers and others instinctively perceive the inadequacy of the vision driving the agenda, and many teachers are left, once again, with the perspective that their organization is not interested in promoting their best interests (Bascia 2008a).

Many teacher unions, attacked by politicians or administrators or attempting to counter attacks on their members, respond in kind, adopting the language and terminology

being used against them. For example, in Ontario, Canada, in the mid-1990s after several decades of cooperative relations between the province and teacher federations, when a new government reduced the scope of federations' authority over teaching-related issues and began calling them "unions," the teacher organizations decided to "play hard ball" and adopted the "union" moniker. In so doing, they also adopted a narrow definition of teacher unionism and its occupational and social responsibilities. Teacher organizations participate in defining the public discourse about teachers and teaching by helping shape the terms of teachers' work through collective bargaining, through communicating with teachers and administrators, and through making statements in the press. They can reinforce or challenge images of teachers as victims or heroes, passive dupes or active agents, technical or intellectual workers, political activists or professionals (Bascia 2000). When unions respond to attacks that explicitly or implicitly cast teachers as selfish and cast teaching as technical work with arguments that fail to contest these characterizations, teachers are handicapped in challenging negative press (Bascia 2008a).

Many unions, then, inadvertently reinforce the status quo: they participate in keeping teachers alienated from decisions that affect their work. Even while some teachers are actively engaged, many are not and cannot see the union as a vehicle for positive educational change. Even while a union may be engaged in multiple activities, its actions may run at cross purposes to one another. While innovation may be occurring in various parts of the organization, its effects are not far reaching. And even when the official messages emanating from union leadership are "revolutionary," they may not reflect or be taken up by many teachers (Bascia 2008a).

### **Addressing the Diversity of Member Needs**

Viable teacher unions make a point of providing a range of different ways that teachers can participate in their organizations. Rather than emphasizing an orthodoxy in terms of the kinds of activities they sponsor, they make member interest and access a priority—for example, providing a wide assortment of different professional development formats and topics, scheduling and locating them in ways that make them accessible to busy, working teachers. They provide a range of leadership opportunities so many different teachers can develop organizational skills and become involved and known to others. They make a point of rotating the demographics of leadership so neither teachers nor outsiders develop the impression that the union is not representative of the broad teacher population (Bascia 2008a).

### **Minimizing Internal Fragmentation**

Within teacher unions, staff associated with professional development, collective bargaining, and other organizational priorities tend to interact with distinctly different people (such as government officials, administrators, "teacher leaders," teachers in

trouble) and maintain distinctly different views of the world.

Some organizational priorities  
(professional development)  
are less valued than others  
(political action).

Differences in worldview can result in a rich program of organizational "products," but they can also lead to organizational sub-units acting in ways that actually undermine the efforts of others, and specific projects can be rendered ineffective and invisible by actions and publicized statements that reflect other organizational priorities. Within many contemporary teacher

associations, some organizational priorities—such as professional development—are less valued than others—such as political action (Bascia 2008a).

Most teacher unions are organized internally into discrete units, much like the departmentalized structure of high schools. Staff associated with collective bargaining, professional development, and teacher welfare work independently of those in other units, are responsible for distinct tasks, tend to interact with distinctly different people outside the organization, and, as a consequence, maintain distinctly different views of the world. They may intentionally or unintentionally hoard information (sometimes not knowing how what they know might be useful to others outside their unit), they often compete for resources and organizational influence, and they may even work at cross purposes. Collective bargaining and professional development staff often find themselves in such diametrical opposition. Their limited and particular views of the world result in less effective, less resilient products and strategies than if they had shared information and expertise. Their independence from one another leads to organizational fragmentation and incoherence. Educators viewing their efforts are often frustrated by what they perceive as inadequate responses to their requests for support (Bascia 2008a).

Some teacher unions are well staffed, but others are inadequately staffed as a result of a minimal degree of teacher engagement in union activities and issues. A small number of staff may each be forced to perform multiple roles. This can lead to further fragmentation and incoherence in a downward spiral that can lead to further disengagement of teachers.

Collective bargaining and professional development staff are often in diametrical opposition.



## Recommendations for American Teacher Unions

In recent years, large-scale federal and state policies have undermined the strength of teacher unions. This and the intensity of recent condemnations by the media have caused teacher unions to take different approaches: reacting defensively, accommodating to reform initiatives, developing partnerships with education officials, and forging new reform directions of their own. But whatever their approach, successful, enduring teacher organizations seem to share particular organizational characteristics. There is much that can be done by tending to their own organizational priorities that arise out of member needs; by ensuring that they are flexible, can manage a comprehensive array of programs, and are internally coherent; and by finding ways to express a different, more productive message about teaching and schooling and, in the process, provide a new discourse by which educators and the public can understand the workings of the education enterprise more fully and with greater empathy. Re-conceptualizing the role of teachers in the arena of educational decision making requires a significant paradigm shift. Leadership is crucial in maintaining and supporting positive working relationships within partnerships.

- Teacher unions must develop and consistently articulate a coherent message about how the education system (and its parts) should work as well as provide necessary supports for teaching and learning, and they must refer back to this message rather than become caught up in the rhetoric of other reform initiatives. Simply reacting to reform proposals put forward by education officials or others is inadequate.
- Teacher unions must clearly understand the costs and benefits of reform partnerships over the short and the long term. The costs and benefits of negotiated positions must be taken into account.
- Teacher unions must pay close attention to their memberships with respect to the variety of needs, members' access to the organization, and communications strategies.
- Teacher unions must select and create reform initiatives that further their basic message regarding supports for the education system. At the same time, rather than investing all reform energies into a single initiative, teacher unions should seek multiple initiatives that respond to member needs.
- Because internal organizational fragmentation is a serious detriment to teacher union effectiveness, it is important to develop organizational strategies that strengthen communication, the appropriate distribution of resources, and access

to information, and to recognize the necessity of unions' multiple roles. Ensuring teacher commitment by providing a variety of ways for teachers to meaningfully participate should help reduce the tendency to take a triage approach to union functions.



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