

Teacher Unions, New Unionism and Shifting Cultural Metaphors

Hasan SIMSEK*
Karen SEASHORE**

Suggested Citation:

Simsek, H. & Seashore, K. (2008). Teacher unions, new unionism and shifting cultural metaphors. *Egitim Arastirmalari-Eurasian Journal of Educational Research*, 31, 93-113.

Abstract

Problem Statement: Since the 1980s, classical industrial unionism has been transforming itself in terms of redefining basic value system and strategies they use. Teacher unions are no exception. This paper draws on a study of a teachers union to initiate school-based change in a single state in the United States. The research was conducted as part of a broader initiative to examine the role of "new unionism" in local and state school reform.

Purpose of the study: The purpose of this study is to portray the past, present and future images of teachers unions from the perspectives of three clusters of important educational policy agents in the state of Minnesota: Bureaucrats or state educational officials, teacher activists or union officials, and policy participants (business, legislature and school superintendents).

Method: A qualitative research design was used to collect data.. As part of the study, representatives of involved union employees, internal and external stakeholders of education were interviewed on two occasions about the role of the union in promoting school reform.

Findings and results: Analysis of data revealed an internal culture conflict within the union between the image (and practice) of union employees who were balancing traditional role obligations and efforts to become "new union" activists for school change. At a later point, other relevant policy actors from a number of sectors (elected and appointed officials, state education agency employees, district administrators and representatives of business groups) were also interviewed about the role of teacher unions in school reform at the state level. As part of the data collection, we elicited metaphors to reflect the cultural position of the union in the past, in the present, and as anticipated in the future. The data

* Professor of Educational Administration in the Faculty of Education at the Middle East Technical University, Ankara, Turkey. E-mail: hasan@metu.edu.tr

** Professor of Educational Administration at the University of Minnesota, Minneapolis, MN, USA. E-mail: klouis@umn.edu

illuminate the way in which culturally embedded expectations about educational actors shift during periods of educational reform, and implications are drawn for the role of unions in influencing change.

Conclusions and recommendations: Four topics emerge: Unions are “returning to their roots”; there is ambivalence about admitting unions to the playing field of change agents; reluctance to view unions as forces for positive change is most pronounced at the political level and least at the local level; and unions need to consider multiple strategies for evolving as leaders for change.

Keywords: Teacher unions, new unionism, school/educational reform, metaphors, unions as change agents.

Teacher unions, modeled after private sector unions, are increasingly challenged to reinvent their purposes or become obsolete. Recent calls by National Education Association (NEA) president Bob Chase for “new unionism,” again modeled after manufacturing sector changes, calls for a shift from traditional collective bargaining activities to incorporate teacher participation and leadership in education reform efforts. This shift, however, has been derailed by the bureaucratic organizational structures and cultures that have defined teacher unions since the early 1900s. This paper examines the role of organizational culture as an agent of change in this shift toward “new unionism.”

Background

Labor unions and teachers. The National Education Association (NEA) and American Federation of Teachers (AFT) represent three million members in 14,000 school districts and focus on traditional salary and working conditions negotiations (Louis, Seppanen, Smylie, & Jones, 2000). Historically, these unions were modeled after post-WWII manufacturing labor unions and brought administrators, school board members, and teachers together to discuss important issues. In the 1950s, a formal relationship between districts and teachers emerged that afforded unions with the power to negotiate wages, hours, and employment conditions in good faith with local districts (Bredeson, 2001). Thus, teacher unions began to use collective bargaining strategies to improve workers’ professional lives and have emerged as powerful political action groups in the national landscape (Cobble, 1999).

Recently, the NEA and AFT reached a partnership agreement that included strategies for joint-negotiation of traditional union bread and butter issues. This agreement stipulates that the union will work to constrain health care costs for union members as well as fight both private school vouchers and tuition tax credits. Additionally, the union would help state and local affiliates to implement the Elementary and Secondary Education Act. However, the partnership also promises to work toward improvement of low-performing and priority schools (NEAFT). This reflects a fundamental shift in the way union interactions with teachers and school districts.

It is as much the duty of the union to preserve public education, as it is to negotiate a contract. – Albert Shankar, American Federation of Teachers.

Recent philosophical and practical shifts. Union organizational arrangements reflect the management structures of school districts (Kerchner, 1999). Increased

competition for public funds from state and federal governments has challenged teachers and union leaders to reinvent themselves or become defunct (Chase, 1997). Cobble (1999) argues that unions must rethink their organizational practices and culture. Union organizational structures were built in the late 19th century and become stronger during the New Deal era. The hierarchical, vertically integrated, bureaucratic structures served the manufacturing sector at that time (Cobble, 1999). What unions represent (the agency function) has changed since the early 1900's yet the structure remains the same. Internally, the unions represent teachers through collective bargaining. Externally, however, leadership is linked to local school superintendents. The unions represent only those currently employed in districts, as well as some who are laid off or retired (Kerchner, 1999). Increasingly teachers identify with their occupation rather than a specific school site. Union members want portable benefits that can move with the workers rather than remain at the work site. Unions, comfortable with giving management the responsibility for standard setting, discipline, and discharges at specific sites, must shift to become leaders who develop good teaching standards (Cobble, 1999). This call has become even more important in considering the political context that impinges upon the teaching profession.

Confidence in public education nose-dived after the 1983 release of A Nation At Risk. Schools that continued to support and produce poor-performing students contributed to this abrupt decline in public satisfaction. Today, 23 states have laws for low-performing schools that involve restaffing and school closings. State courts are becoming increasingly involved with low-performing schools. This has forced unions to assess their role in school performance (Rose, 1998).

Recent state- and federally - driven educational reforms conflict with traditional union bargaining activities and force union leaders to redesign union activities. Many educational reform initiatives require teachers to become school managers or management partners in both daily school operations and long-term strategic planning including mission development. These challenges contrast sharply with traditional union foci on teacher autonomy and control. The "New Unionism," borrowed from the private sector and incorporated most recently at the NEA, shifted from a sole emphasis on traditional union issues to include educational reform activities. The underlying assumption related to "New Unionism" suggests that management and labor must collaborate with one another to meet organizational goals. NEA president Bob Chase called on state NEA affiliates to confer and collaborate with local school districts and boards to improve poor-performing schools. Flexibility at the local level encourages teachers to participate with management in reform development and ultimate efforts (Louis, Seppanen, Smylie, & Jones, 2000).

A similar shift occurred with the American Federation of Teachers (AFT) in the 1998 resolutions adopted at the national level. The AFT emphasized that the unions need to play an active role in school effectiveness and advocated for standardized criteria to evaluate school performance that could guide reform efforts. This would permit teachers and administrators to identify why and how a specific school is ineffective through both internal and external evaluations. The AFT would also provide resources and professional development for teachers and paraprofessionals to learn how to conduct and evaluate the assessments. However,

the AFT also cautioned that any state or district interventions that arise from these evaluations must also provide multiple options to solve or redesign a failing school (Rose, 1998).

These two efforts indicate that teacher unions have begun to define educational norms and values, differently. Concerned with peer review and staff development issues, national unions have increasingly involved teachers in school management issues and processes. However, there are limits to what support the locals can give individual schools. When unions collaborate with local school districts, the small union staff becomes overburdened. Kerchner (1999) argues that the out-dated union structures limit union efficacy and force them to direct their efforts on traditional union issues. Despite the organizational structural impediments that constrain new unionism, some recent strategies have succeeded while others provide more opportunities to examine what is required to implement union reform.

Word from the trenches: Research that describes 'new unionism.' The "KEYS" program, initiated by the NEA, remains the most visible new unionism systematic strategy to involve the labor unions in educational reform. "KEYS", an unconventional initiative, challenged the way that both teachers and administrators viewed the union's role in school improvement. The national effort was developed as a pilot project that represented the new unionism ideals. The main components of the program included school quality activities; administration of an assessment instrument at the school level; state/local association engagement with schools; and, training and technical support to involve teachers in school improvement. State and local unions were reluctant to embrace the Initiative because it was not widely understood. Delivery mechanism related to current organizational structures at all levels (states, locals, schools, and the national union) impeded progress. Furthermore, sites complained that preparation, technical support, and follow-through were inadequate to sustain long-term changes in either schools or school districts. It became clear that "KEYS" ultimate success relied upon both union leaders' and members' perceptions of work roles, values, and working relationships. Union members remain entrenched in the traditional union idea and could not move toward a new unionism that would facilitate their emergent roles as school management partners ((Louis, Seppanen, Smylie, & Jones, 2000).

Using research-based programming as a centerpiece of educational reform, the AFT assessment efforts have provided more substantive results. For example, a staff self-assessment facilitated the collaboration of the union and a school district that expanded school decision-making and strengthened communication between administrators and teachers. One school mission focused efforts on literacy, which resulted in increased reading scores. Although the union was successful at this site, the national leadership cautions that the union must also work to negotiate school redesign or closing when schools will not work regardless of reform strategies (Rose, 1998).

Despite the improvements made through collaborative arrangements between unions and school districts, new unionism is criticized considerably. Opponents argue that new unionism subordinates educational consumerism and is useful only to serve school employees through the implementation of their own value systems (Bredeson, 2001). Thus, one of the strengths of new unionism - the communication

of educational norms and values – also becomes a criticism of union activities and influence. Clearly, the early results indicate that leadership is important to new unionism and the growth of professional learning. However, studies also show that new unionism is expressed through structural and organizational culture shifts, yet the quality and flexibility of the new unionism ideal has not yet been achieved (Bredeson, 2001). This paper focuses on the organizational structural and cultural issues that serve to either facilitate or impede union reform.

Statement of Problem

The purpose of this paper is to portray the past, present and future images of teachers unions from the perspectives of three clusters of important educational policy agents in the state of Minnesota: Bureaucrats or state educational officials, teacher activists or union officials, and policy participants (business, legislature and school superintendents). The data collection for this image study based on articulated metaphors and analogies by the representatives of these three interest groups was focused on exploring the following sub problems:

1. Is there a real change in the traditional union concept in Minnesota as espoused and declared by NEA and AFT leadership?
2. What metaphor, image, analogy, animal or living organism would best describe the teacher unions of the pre-1990s?
3. What typical union strategies and tactics have the teacher unions employed to support these images?
4. What metaphor, image, analogy, animal or living organism would best describe the teacher unions of today?
5. What typical strategies and tactics have the teacher unions employed to support these new images?
6. What factors at the national and state levels may have had the greatest impact on efforts to involve teacher unions in school reform and school improvement in Minnesota?
7. What in-school factors may have played role on the efforts to involve teacher unions in school reform and school improvement in Minnesota?
8. What should the unions of future look like (e.g. at the year 2020)?
9. What practical strategies, actions and initiatives by teacher unions may make this dream possible?

Methods

Metaphors as a methodological innovation in social sciences have attracted the attention of scholars studying often implicit and symbolic side of organizations. Lakoff and Johnson's now classical work on metaphors (1980) was the first significant work leading to this methodological innovation. They argued that metaphors constitute a figurative or imaginative language that is very common in our daily language: "Our concepts structure what we perceive, how we get around in the world, how we relate to other people... the way we think, what we experience

and what we do every day is a matter of metaphor" (Lakoff and Johnson, 1980, p. 3). Morgan (1986), taking this lead, used metaphors as tools of diagnostic reading and critical evaluation of organizational phenomena that are, according to him, complex, ambiguous and paradoxical.

A number of studies, mostly in organization theory and change, have utilized metaphors as data collection methods (Morgan, 1986; Morgan, 1993; Steinhoff and Owens, 1989; Simsek and Louis, 1994; Simsek, 1997). Others have also used metaphors in analyzing different aspects of education such as images held by school children and teachers about their school (Schlechty and Joslin, 1986; Dana and Pitts, 1993; Ormell, 1996; Inbar, 1996; Ozar and Simsek, 1999; Beck, 1999).

Besides their methodological practicality, metaphors also become critical tools of diagnosis and evaluation of situations where there is great deal of language constraints and conceptual ambiguity. As Marshak argued, "metaphors serve as a primary method for understanding and expressing abstract, affective and intuitive experience" (1993, p. 44). They are also equally important useful tools in situations of either political or psychological sensitivity or volatility. It is our argument that metaphors may become effective tools of eliciting information by going beyond the constraints of everyday language especially on highly volatile, politicized issues. Potential value of metaphors in sensitive policy issues, such as teachers unions and how they are seen by various policy actors in a highly volatile political environment where teachers unions are seen as the resistors of recent educational reform movement in the state of Minnesota, has not been utilized much. With union issues, people have the language but it is constrained by conventional responses based upon "group membership" (or position).

This research is a typical qualitative study where real world situations are studied as they unfold naturally. The aim is not verification of a predetermined idea or a set of hypotheses, but discovery that leads to new insights (Sherman and Webb, 1988, p. 5). A standardized open-ended interview guide approach (Patton, 1990) was followed to collect the data. The guide contained twelve open-ended questions on various aspects of teacher unions, e.g. teachers unions of the pre-1990s, teachers unions of today, teachers unions of future, education-related and non-education related factors forcing teachers unions to change, etc. Among these, three questions were particularly on metaphors and analogies where the participants were asked to generate metaphors, analogies or images that would describe the unions of the past, the present and the future.

Sampling design was a "*purposeful sampling*." This sampling strategy was thought to be particularly useful (or even required) to maintain a balanced representation of the views of important educational players on teachers unions in Minnesota. Interviewees were selected among a large group of people representing three clusters of educational interests groups: state officials or bureaucrats, teacher activists or union representatives, and policy participants involving business, legislature and school officials like superintendents.

A typical interview took about 30 minutes to 45 minutes of interviewing time and each interview was tape recorded by the consent of participants. Each interview tape was later verbatim transcribed by professional typist.

The transcribed notes were analyzed by using a typical “content analysis” technique by which important segments of text were cut and clustered under relevant idea categories. The initial formation of these idea categories was based on the categories of questions that formed the interview guide. During the data analysis, these initial twelve idea categories (drawn from the interview guide) gave way to more elaborate sub categories. Metaphors, analogies and images produced by the interviewees were also categorized based on their metaphoric similarity or the descriptors used to define a particular metaphor.

Results

Is there a Real Change in the Traditional Union Concept in Minnesota as Espoused and Declared by NEA and AFT Leadership?

There are three response categories emerged out of the interview data regarding whether or not there has been some real changes in teacher unions in terms of philosophy, policy and strategies they employ: No change, some degree of change and a great deal of change. A few people among the respondents think that there has been real, important changes in teachers unions as advocated by the national leadership of two powerful teacher organizations, NEA and AFT. The president of Association of School Administrators made the following comments:

Longer than 1997, we can go back to the early 1990s and identify a number of ways in which this has played itself out in Minnesota. 1989, we're at the capitol during a legislative session. There's a legislative proposal that would require school districts to de-centralize by creating site teams and district teams which are composed of very specific composition... And I think we all as an educational organization saw that piece of legislation and said, “if that thing passes, it is very poor legislation. It won't help reform and indeed will probably stifle it...” And then the groups went line by line through that legislation and then recommended changes to them that we said would be helpful... They made every change that we asked... So that's a very concrete example of unions working with management and policy makers, boards, to help reform schools... And I could probably cite half a dozen more given time...

Interestingly, those who observe changes in the overall union identity and practices seem to have close relationships with teacher unions at district or school levels. At least one of these persons was a union official, so s/he was an insider to the unions:

AFT started thinking about change a lot earlier like 1983-85. Our president Al Shanker commented about the need for change for a professional model teachers. The theme was to make teaching a professional area, professionalizing teaching. We emphasized collaborative relationships rather than hostile and antagonistic relations (with school administrations). Early 1990s, we hired a futurist to do “futures report” on our organization. After that report, we are convinced that we must focus on *students*, to be concerned about the *health of institutions we work in*, and *empowerment of teachers*.

Unfortunately, change in unions in terms of strategy and image observed by these individuals were not shared by other respondents who did not have this close proximity to unions, however all coming from different levels and circles of school system and education business in the state of Minnesota. For example, the person representing the Minnesota Business Roundtable said the following:

Unions haven't changed tremendously. There are signs of change in some districts, but in many of them, primary concern is still salary, compensation and work environment; simply more resources...

Interestingly, the most intense resistance to the idea of whether or not teacher unions have changed in terms of basic strategies they follow came from state education agency officials, one legislature and some district and school officials. Here are some representative views of different individuals from these different stakeholder groups:

Overall, I don't see a change. As far as the teachers are concerned, they are not interested in children's learning. They stand in the way of reform. They are still more interested in money and benefits. Change is not possible without active involvement of teachers.

With regard to teacher training initiatives in Minnesota, we have got very little from the teacher unions. They did not care and provide any support.

In Rosemonth and Apple Valley school districts, they demanded increases in compensation that much exceeded the district's financial ability. Compensation is legitimate but it's not the only important thing.

The standards movement in our state. They haven't given the support expected from them.

I see some change, but not a great deal. Systemic reform is not the case when it comes to the unions. These comments are more relevant for the national level. We don't see a great deal of change at the local level consistent with these comments. This may be because of the fact that unions do not have control over the local levels. Unions are political organizations; they are supposed to be democratic. So they hesitate to tell what to do and how to do to their members, to dictate from the top. They are still more busy with bread and butter issues.

One thing becomes clear that if union officials are serious about change and if they think they have taken important steps for a new union image and identity, they have a serious problem of "public relations," that is, explaining and proving the case of change to educators and general public in a convincing manner.

What Metaphor, Image, Analogy, Animal or Living Organism Would Best Describe the Teacher Unions of the Pre-1990s?

We tried two different ways of collecting data on metaphorical description of the pre-1990s union concept. First, we asked an open ended question to the respondents to generate a metaphor. This method was found a little problematic for the respondents; however we were able to gather very valuable metaphoric descriptions on teacher unions. Second, we showed them a printed page (which was borrowed from Gareth Morgan's influential management book, "Imaginization"-- 1993) that

holds about 30 different pictorial images and asked the respondents to choose one or two images from this page. Since we knew that descriptions or adjectives were more important than the images themselves, we, in turn, asked the respondents to explain why they chose the images of their choice. Here are the list of images that were both self-generated and chosen:

Images generated:

* **Sitsu dog** (a little dog which is very protective of whatever she is supposed to protect and care –in our case, it's our youngest child-. She wouldn't hesitate to hurt you if you get in her way).

* **Gate keepers:** in terms of decision making, they decide what goes in and what not.

* **Raw unionism, labor/management, and factory:** Between 1976 and 1988, it was the primary concern of teacher unions to focus on salary, benefits and work conditions. Teachers were like workers, coming to work, doing some assigned tasks and going home.

* **Something that doesn't like change,** likes status-quo.

* **Factory workers** (1960s and 1970s, our primary concern was basic needs and resting the power away from the employer as a reflection of general labor movement-- Civil servant mentality

* **A battle-ground** (usually around pay)

Unions= A blue-collar identity, worker mentality

* **Mother bear:** Very protective, fierce, I know what is best for you kind of an attitude (or my way or highway kind of a tough minded attitude)

* **Old boys' club**

Images chosen:

* **A Rhino:** Acts in straight lines, locks on a single target, God help you if you are in his path.

* **Iceberg**— there is more than what most people would realize

* **Hammer:** trying to use force of hammer to hit people

* **Man with blindfold and cowboy hat:** holding up a district

* **Dollar sign**

* **Hammer**— control, my way or...., force...

* **Hammer and electric drill** as a reflection of trades and industrial unions

* **Hammer:** this is what we want and we will fight until we get it

* **Dollar sign:** primary concern of salary and material issues

* **Robin Hood**

* **Sheep:** Most of their members are like sheep, or they at the top see and treat their members as sheep

The list above includes images collected from all the respondents including the union officials. There seems to be a great deal of uniformity in the views of all the participants on the teacher unions of the pre-1990s, that is the old union conception is solely based on protection, threat, force, bread and butter emphasis, and industrial worker mentality.

What Typical Union Strategies and Tactics have the Teacher Unions Employed to Support these Images?

Majority of the respondents including the ones who were relatively close to the operational levels like schools and districts and even the union insiders mentioned that the typical strategies or tactics the teacher unions used as a reflection of the old union identity were collective bargaining, salary and benefits, protection of membership, compensation and work environment issues. One of the respondents provided a startling example of how these issues were holding the center stage in collective bargaining process:

Until 1982, there was a declining enrollment in many districts. This led to budget cuts and less resources. In these difficult days, districts said: if you demand this much then we have to increase the class size. The union said “yes” to this proposal. They said, give us as many kids as you’d like, our main concern is a livable salary. I don’t think they would do it today.

Even a union official made similar remarks on the same issue:

Before the 1980s, we thought ourselves as factory workers. During the 1960s and the 1970s, our primary concern was basic needs and resting the power away from the employer as a reflection of general labor movement.”

A state education official supported this view: “What they [teacher unions] do is mainly bargaining. Every two years a new contract comes and we see quite active union people around in those days.”

Another state official mentioned strikes, grassroots strategies, public gatherings and contracts as typical strategies and tactics used by the teacher unions as a reflection of their industrial labor image. These strategies are very supportive of the previously listed images provided by the participants.

What Metaphor, Image, Analogy, Animal or Living Organism Would Best Describe the Teacher Unions of Today?

By following the same method data collection described under # 2, participants were asked to generate metaphorical images that would describe the teacher unions of today. The provided images are listed below:

Metaphors created:

* **Still a sitsu dog:** it’s too early to tell anything new, they are still the same

* **A tree starting to split** (as an indication of change at its initial phase). There has been slow and gradual change as a result of pressures, however, the old paradigm is still there.

* **A team working on solutions:** much more reform minded, willing to be flexible and collaborative. We had very limited contact and cooperation in the old days. Now we talk and communicate more.

- * **Still a hammer**
- * **Professional development:** people supporting and helping each other
- * **Round table:** A lot of professionals working together
- * **Getting in front of the fickle,** smelling where the money is and going there
- * **A righteous fight:** fighting an invisible enemy, battling with wind mills, but that enemy is not there anymore
- * **Smoke-filled backroom,** heavy handed
- * **A player at the table:** they want to have a voice in policy making

Metaphors chosen:

- * **The spider plant** – the plant starting to get shoots (indication of change)
- * **Superwoman:** an effort to improve our schools
- * **Eye glasses:** we have a clear vision to work together
- * **Gene lamp:** we have the potential to unlock the reform in education
- * **Still a hammer**
- * **Wonder woman (superwoman):** professional support
- * **Swiss jackknife:** they do have more tools today and they are more sophisticated in marketing ideas
- * **Iceberg:** Union is just the tip; they don't represent the population of teachers, an unseen force
- * **Roundtable:** they are trying to change their image to a more collaborative type. They haven't succeeded yet but compared to earlier times, they are at least present at the table
- * **A bullhorn:** they are talking about certain issues out loud today.

The list above proves a rather divided image of the teacher unions of today. The positive images that signals some degree of change were provided by union people and educators and school officials who have some degree of close contact with the unions. The negative images, however, were most provided by state education agency officials, the business representative, high level district officials and one legislature. This may tell us that unions have rather different images in the minds of people who may be called insiders and outsiders. On the other hand, while people close to the operational level are having more positive views of today's teacher unions, people at the policy level do not conform to this positive perception.

What Typical Strategies and Tactics have the Teacher Unions Employed to Support these New Images?

Analyzed data on this issue coupled with the metaphors listed earlier provide enough evidence that many people see no real change in teacher unions in terms of strategy, tactics and philosophy they use today. Only the union official was able to provide some evidence of change in her own organization:

Profession is becoming young. Young people have different ideas about the profession, about teaching. So, we need to reflect this change in our own agenda and how we approach to our members... In 1989, we negotiated the word "peer review" system which is a result of our professionalization vision... We are moving from civil service mentality to a professional mentality... There is an ongoing program and policy work in our organization. With NEA, we have Teacher Union Reform Network (half is composed of NEA members, and half is of AFT members). We have other ongoing works on achievement of students, quality teaching, democratization, and teacher professionalization.

However, how all these works will have an impact on the union image held by outsiders are not yet known.

What Factors at the National and State Levels may have had the Greatest Impact on Efforts to Involve Teacher Unions in School Reform and School Improvement in Minnesota?

Respondents cited the following factors as sources of pressures for change in teacher unions. According to the respondents, these forces either have already impacted teacher unions for change or they will in the near future.

- * Standards movement
- * Charter schools
- * Public school reform
- * Changing demographics
- * Limited resources in the future
- * Business interest and pressures on public schools
- * Growing demand for educational accountability (largely from public and business community)
- * Changes in state policy regarding education and unions
- * Teacher training institutions
- * Different value system and expectations of the new generation entering to the profession
- * The profession not being able to attract the best and the brightest anymore (especially women seeking for alternative career paths rather than entering the teaching profession)
- * Recent immigration waves from other countries and from other urban centers
- * Poverty
- * Strong union leadership at all levels to turn things around
- * New market paradigm and it's incompatibility with socialist mentality

Clearly, the list above proves the point that largely external factors and forces have resulted in some degree of change in union identity from the views of the participants. As many educational reforms conform to this rule, similarly culturally

embedded expectations about educational actors shift during periods of educational reform. This also seems to be true for the teacher unions.

What In-School Factors may have Played Role on the Efforts to Involve Teacher Unions in School Reform and School Improvement in Minnesota?

The following in-school or education related factors were cited the most by the respondents as the ones that may have impacted the teacher unions to involve more in school reform issues:

- * A new kind of union leadership (advocating reform) for teacher unions
- * Teachers: They need to bend together to question outdated union practices
- * More and better information about how our schools do, perform, how our students do in school. As long as we get more and better information about these indicators, unions will realize the need for change.
- * Restructuring, standards, accountability.
- * Profiles of Learning: Teachers and administrators are scared to death of this standards movement, certainly the unions.
- * Charter schools, vouchers
- * Stable or less public spending for education in the future

What should the Unions of Future Look Like (E.G. At The Year 2020)?

By following the same method data collection described under # 2 and # 4, participants were asked to generate metaphorical images that would describe the teacher unions of future. The provided images are listed below:

Metaphors created:

- * **A study group:** identify a topic for a year, work on it, and learn together as professionals.
- * **An action research cadre**
- * **A member association,** a professional organization (like doctors' and lawyers')
- * **A professional organization** like doctors' and lawyers' organizations
- * **Roundtable** where people are seated to solve issues and problems
- * **A guild:** provider of professionals, quality control of the profession. An organization that is more flexible, less hierarchical, more geared to assisting teachers in the work place
- * **Butterfly:** Needs to be transformed and this has to be done quickly
- * **Baking:** they should work making every ingredient ready for teachers. They should make the life of their members easy by preparing conditions.

Metaphors chosen:

- * **A roundtable**
- * **Roundtable with chairs around**—you bring a topic to the table, work and focus on it.

* **Eagle, Robin Hood, Scholarly Bust:** An organization that is vigilant, but to a degree, also hands off.

* **An owl:** we can use our time and efforts wisely

* **An owl:** Whatever we do, we need to do it wisely, and we need to be smart on what we do

* **An Owl:** We have the wisdom to change things in a nontraditional way

* **Three stepping stones** in a river

* **Lighthouse:** it should show the way, light the way (the ways that there may be other ways the things can be done).

* **Lighthouse:** Rather than demanding, they should light the way

* **Lighthouse:** Showing and lighting the way

The images of roundtable, study group, action research cadre, a professional organization were provided by union officials and union people close to the operational level. They have an image of teacher unions that is more professional like classical membership organizations such as doctors' and lawyers' organizations. Other images provided by other stakeholders share a similar vision for the future of teacher unions. Overall image data provided so far indicate that the school reform stakeholders including the union officials share a similar view of teacher organizations of the past and the future. However, they have a rather divided perception on the teacher unions of today.

What Practical Strategies, Actions and Initiatives by Teacher Unions may Make this Dream Possible?

Majority of the respondents think that teacher unions need a radical reorientation in their thinking, strategy, tactics and philosophy. Some think that the overall union idea is a by-product of the industrial era and since it's over, teacher unions must eventually follow a new direction consistent with post-industrial environments if they wish to survive. Others think that there is still need and enough room for teacher unions if they change themselves and take the lead. As one of the respondents pointed out, they may start asking some tough questions:

They need to start admitting that all things are not as we would like to see. We are not doing a good job in public education anywhere. Unions may take a lead on opening a public dialogue on the issue of public education reform. Unions in Minnesota generally say "no, period," rather than saying "no" and coming up with some alternatives.

Other respondents also provided some important aspects of change and reform in teacher unions. Here are some of the ideas they think the teacher unions need to focus on:

* Start focusing on teacher quality

* Set professional standards for the profession

* Set professional standards for teachers

* Take the lead for professional development of teachers

- * Negotiate one time pay for skills set, pay for staff development, make teacher development a standard bargaining item.
- * Create a need for an urgent institutional transformation
- * Provide strong leadership at all levels to bring about this transformation
- * Promote pay for performance
- * Be close to the school and classroom levels, pay attention to teachers, and listen to their members at the operational levels
- * Create a new organizational configuration; a flat organizational design close to the classroom levels rather than hierarchical.

Discussion and Conclusions

Preliminary analysis shows there is more consistency in what the union has been than what the union currently is or will be. The image of “hammer” was the most repeated metaphor or analogy among others suggesting that participants have a more clear picture of an organization in the past (lived and experienced) than present (ambiguous) and future (uncertain). As Simsek and Louis argued (1994), this ambiguity of the present may equally be a sign of change and flux in the target phenomenon (teachers unions in this case) where the case of change may create a fuzzy imagery among the observers. Stabilization occurs when there is a shift from one consistent image to another.

Interviews with the representatives of three clusters of educational constituents in the state of Minnesota [bureaucrats (state education officials), activists (union people), and, policy participants (legislature, business, superintendents, etc)] reveal some interesting theoretical insights: Bureaucrats seem to be the most culturally and perhaps ideologically homogeneous group whose representatives come from different layers of the state educational bureaucracy consistently expressing a rather negative image of teachers unions. Union activists, on the other hand, represent the most layered view. While officials close to the top of the organization representing rather liberal views and expressing a need for change in their own philosophy and strategy, people at the lower levels represent a more conservative orientation on change. Interestingly these union activists become the ones who represent their organizations at the school and district levels. This dichotomy may best be represented by the image of “iceberg” denoting to this multi-layered establishment.

It seems that the image or positions of the participants are very much influenced by the positions of people in a single organization and their professional interests. However, there still seems to be a remarkable consistency among the images provided by these constituents representing a diverse individual, professional and organizational differences. This may tell us the existence of another highly diffused case of “paradigm membership” (Simsek and Louis, 1994) among a different series of populations on the issue of teachers unions.

To conclude, we would like to emphasize the following seven sets of ideas as a result of our research on teacher unions in Minnesota:

1. Despite the general rhetoric of the teachers unions leadership at the national level, participants, especially the ones representing state educational bureaucracy and other policy participants such as business do not perceive real change in overall union identity, philosophy, strategy and tactics they use. They generally associate unions with resistance to important reform efforts in the state of Minnesota such as Profile of Learning, the latest and the most important state-wide standards movement in public schools.

2. When they were asked to generate metaphors or analogies to describe the unions of the pre-1990s, the participants used metaphors or analogies that have the qualities of force, protection, threat, struggle, and fierceness. The most repeated metaphor (even by a union official) was "hammer" denoting to such qualities as naked force, control, and inflexibility: "trying to use force of hammer to hit people" [usually the administration], "...as a reflection of trades and industrial unions," "...this is what we want and we will fight until we get it." A shitzu dog (a guarding mentality to protect his/her own territory), a mother bear (protective, fierce and I know what is best for you kind of an attitude), a rhino (acts in straight lines, locks on a single target, and God help you are in his path) were interesting descriptive images that were used by the participants to describe the unions of pre-1990s. The third cluster of metaphors that were repeated the most were the images of factory and worker resembling teachers unions to trades and labor unions of the 1960s and 1970s in terms of general strategy and tactics.

3. The typical strategies and tactics the teachers unions have utilized in the past (and even today according to state educational bureaucrats and some policy participants) were (and are) collective bargaining, salary and benefits, protection of membership, compensation and work environment issues. When compared with metaphors describing the old union concept, there seem to be a striking match between these strategies and tactics representing the behavior of unions and the metaphors and analogies representing their symbolic image among a number of educational constituents.

4. When asked to describe the unions of today, some of the participants (especially from the state educational bureaucracy and business) used the same images that they used to describe the unions of the past, meaning that their image of the teachers unions of today is no different than the unions of the past. In this sense, they repeated the same metaphors or analogies they used to describe the pre-1990s unions (still a shitzu dog, still a hammer). On the other hand, some of the participants especially from union activist groups, and some policy participants (association of school principals) saw a degree of change in overall union identity and practices. This is why they generated such metaphors as "a tree starting to split," "the spider plant starting to get shoots," "a team working on solutions," "a roundtable in terms of being more collaborative," "a player at the table wanting to have a voice in policy making," and, "a bullhorn indicating the intend of the union's leadership to talk about certain issues out loud." Among all these, we think the most interesting metaphor or analogy was the image of "iceberg" representing the essence of all those images in the most vivid way: there seems to be the case of change, but we just see the tip of the iceberg, we don't know what is under water. We have to

wait and see whether or not a real and dramatic transformation will come through in teachers unions.

5. The participants think that such social, educational, political and economic forces and trends would have the biggest impact on teachers unions to change: standards movement, charter schools, public school reform, changing demographics, further business interest and pressure on public schools, growing demand for educational accountability, pre-service teacher training practices, different value system and expectations of the new generations entering the profession, strong union leadership and increasing pace of the market paradigm outdating the socialist mentality of the unions of the past.

6. When asked what metaphor or analogy they would use in describing an ideal teachers union of the future, three clusters of images came out quite strongly: a) a study group around a round table solving problems together, learning together as professionals; b) a professional organization like doctors' and lawyers' association or a guild (association of professionals setting and maintaining quality control standards, an organization more flexible, less hierarchical and geared more to assisting teachers in the work place); c) a lighthouse showing and lighting the way. Three people also used the image of an "owl" to suggest that the change can be brought about by wise and smart policies, by using time and efforts wisely and using wisdom to change things around in a non-traditional way.

7. Finally, the participants provided some ways of achieving the ideal image they provided for teachers unions: start focusing on teacher quality, set professional standards for the profession, take the lead for professional development of teachers (make professional development a standard item of collective bargaining), create a need for urgent institutional transformation, develop and promote standards for pay for performance, provide strong leadership at all levels to bring about change and transformation, be close to schools and classroom where the real action is (the operational levels), create a new organizational configuration (for unions) based on a flat organizational design close to the classroom level.

References

- Beck, L.G. (1999). Metaphors of educational community: An analysis of the images that reflect and influence scholarship and practice. *Educational Administration Quarterly*, 35(1), 13-45.
- Bredeson, P.V. (2001). Negotiated learning: Union contracts and teacher professional development. *Education Policy Analysis Archives*, 9(26). Retrieved May 10, 2006, from <http://epaa.asu.edu/epaa/v9n26.html>.
- Chase, B. (2005). "United mind workers": Our unions must organize around quality. Retrieved October 9, 2005, from <http://www.nea.org/bt/6-association/052597.pdf>.
- Cobble, D.S. (1999). History, women's work, and the new unionism. *Thought & Action*, 19-24. Retrieved January 21, 2000 from <http://www.nea.org/he/heta99/f99p19.pdf>.
- Inbar, D. E. (1996, Spring). The free educational prison: Metaphors & images. *Educational Research*, 38(1), 77-92.
- Jenkins, K. (1988). Metaphor and mindset for educational leadership. *The Educational Forum*, 52(2), 43-151.
- Kerchner, C. (1999). Knowledge workers: Trade unionism's new frontier. *Thought & Action*, 11-17. Retrieved January 27, 2000 from <http://www.nea.org/he/heta99/f99p11.pdf>
- Lakoff, G. & Johnson, M. (1980). *Metaphors we live by*. Chicago, IL: The University of Chicago Press.
- Louis, K.S., Seppanen, P., Smylie, M.A., & Jones, L.M. (2000). Unions as leaders for school change: An analysis of the "KEYS" programs. In K. Riley & K.S. Louis (Eds) *Leadership for learning: International perspectives on leadership in school reform and change*. London: Falmer.
- May, S.K. (1993). A Communication course in organizational paradigms and metaphors. *Communication Education*, 42, 235-254.
- Morgan, G. (1986). *Images of organization*. Newberry Park, CA: Sage Publications.
- Morgan, G. (1993). *Imaginization: The art of creative management*. Newberry Park, CA: Sage Publications.
- Rose, M. (1998). Redesigning low-performing schools: It's union work. *The American Teacher*. Retrieved March 17, 2002, from www.aft.org/edissues/rsa/guide/redlps.htm
- Schleghty, P.C. & Joslin, A.W. (1986). Images of schools. In A. Lieberman, (ed.), *Rethinking School Improvement: Research, Craft and Concept*, New York, NY: Teachers College Press.
- Simsek, H. (1998). Metaphorical images of an organization: The power of symbolic constructs in reading change in higher education organizations. *Higher Education*, 33(3), 283-307.
- Simsek, H. & Louis, K.S. (1994). Organizational change as paradigm shift: The case of a large, public university. *Journal of Higher Education*, 65(6), 670-95.
- Steinhoff, C. R. & Owens, R. G. (1989). The organizational culture assessment inventory: A metaphorical analysis in educational settings. *Journal of Educational Administration*, 27(3), 17-23.

Öğretmen Sendikaları, Yeni Sendikacılık ve Dönüşen Kültürel Mecazlar (Özet)

Problem Durumu: 1980'lerde beri klasik endüstriyel sendikacılık kavramında dikkate değer bir dönüşümün yaşandığı ileri sürülmektedir. Sendikacılık kavramının üzerine oturduğu temel algı, varsayım, ideoloji, ilkelerin ve sendikacıların kullandığı temel strateji ve taktiklerin köklü bir şekilde değiştiği genellikle kabul görmektedir. Öğretmen sendikalarının bu değişim ve dönüşümün dışında kalması düşünülemez. Bu gözlem ve varsayımlardan hareketle, bu araştırma Amerika Birleşik Devletleri'nin Minnesota eyaletinde öğretmen sendikalarının okul reformu konusunda önderlik almalarını inceleyen bir çalışmaya dayanmaktadır. Makaleye kaynaklık eden araştırma "yeni sendikacılığın" yerel ve eyalet düzeyinde okul reform sürecindeki rolünü incelemeyi amaç edinen daha geniş kapsamlı bir araştırmanın parçası olarak gerçekleştirilmiştir.

Araştırmanın amacı: Araştırma Minnesota eyaletinde eğitim politikaları konusunda önemli role sahip üç önemli paydaşın öğretmen sendikalarının dünü, bugünü ve geleceği hakkında sahip oldukları imajları elde etmek ve öğretmen sendikaları kavramı üzerindeki algılarını öğrenmektir. Sözü edilen üç önemli paydaş şunlardır: Eyalet düzeyinde eğitim kararları üzerinde söz sahibi olan bürokratlar veya eyalet hükümet görevlileri, öğretmen sendikalarının üye ve yöneticileri ve eğitim politikalarının şekillenmesini doğrudan veya dolaylı yollardan etkileyen iş çevreleri, eyalet meclis üyeleri ve eğitim bölgelerinin yöneticileri. Araştırma şu alt problemler çerçevesinde tasarlanmıştır:

1. Ulusal Eğitim Derneği (National Education Association-NEA) ve Amerikan Öğretmen Federasyonu (American Federation of Teachers-AFT) yöneticileri Minnesota eyaletinde geleneksel sendikacılık kavramında bir değişiklik olup olmadığı konusunda ne düşünmektedirler?

2. Hangi mecaz, imaj veya analogi 1990'lar öncesinin öğretmen sendikalarını en iyi tanımlayabilir?

3. Öğretmen sendikaları eylem ve çalışmalarında bir önceki alt problemde ifade edilen mecaz, imaj veya analogileri destekleyecek ne tür strateji ve taktikler kullanmışlardır?

4. Hangi mecaz, imaj veya analogi bugünün öğretmen sendikalarını en iyi tanımlayabilir?

5. Öğretmen sendikaları bugünkü eylem ve çalışmalarında bir önceki alt problemde ifade edilen mecaz, imaj veya analogileri destekleyecek ne tür strateji ve taktikler kullanmaktadırlar?

6. Minnesota eyaletinde, ulusal veya eyalet düzeyindeki ne tür etkenler öğretmen sendikalarının okul reform çalışmalarına etkin katılımları konusunda etkili olmuştur?

7. Minnesota eyaletinde ne tür okul-İçi etkenler öğretmen sendikalarının okul reform çalışmalarına etkin katılımları konusunda etkili olmuştur?

8. Geleceğin öğretmen sendikaları nasıl olmalıdır?

9. Öğretmen sendikalarını bir önceki alt problemde dile getirilen gelecek tanımına ne tür strateji, eylem veya girişimler götürebilir?

Araştırmanın yöntemi: Yukarıdaki alt problemler çerçevesinde tasarlanan araştırma nitel bir çalışma olarak yürütülmüştür. Temel veri toplama yöntemi olarak gö-

rüşme kullanılmıştır. Bu amaçla oniki adet açık uçlu sorudan oluşan bir görüşme formu geliştirilmiştir. Görüşme formunda ne tür soruların yer alacağına büyük ölçüde alt problemler yol göstermiştir. Her alt problem hakkında en az bir açık uçlu görüşme sorusu geliştirilmiş, yeri geldiğinde sonda sorularla alt problemler hakkında very toplanmıştır. Sözü edilen oniki soru içinde üç tanesi sadece mecaz elde etmek için sorulmuştur. Bu sorular yoluyla görüşülen kişilerden öğretmen sendikalarının dünü, bugünü ve geleceği hakkında mecazlar üretmeleri istenmiştir.

Araştırmada "amaçlı örnekleme" yöntemi kullanılmıştır. Görüşülen kişiler, öğretmen sendikaları ve eğitim/okul reform hakkında zengin bilgi ve deneyime sahip olduğu düşünülen üç paydaş gurubundan seçilmiştir: Minnesota eyalet meclisinde görev alan parlamenterler ve eğitim konusunda rol üstlenen bürokratlar, öğretmen sendikalarının üye ve yöneticileri ve eğitim politikalarının şekillenmesinde rol alan iş çevreleri ve eğitim bölgelerinin yöneticileri.

Tipik bir görüşme 30-45 dakika arası sürmüş, görüşmeler katılımcıların izniyle kaydedilmiş ve sonra profesyonel kişiler tarafından bire bir yazıya dökülmüştür. Yazıya dökülen görüşme kayıtları içerik analizine tabi tutulmuştur. İçerik analizi yapılırken araştırmaya yön veren oniki alt problemin her birisi bir ana kategori olarak alınmış, bu her bir ana kategori altında yeri geldikçe alt kategoriler oluşturulmuştur. Özellikle üçalt problem karşılık gelen mecaz ve imajlar ise benzerlikleri anlamında alt kategoriler halinde sınıflandırılmıştır.

Bulgular ve sonuçlar: Araştırmanın temel bulguları ve sonuçları şunlardır:

1. Öğretmen sendikalarının üye ve yöneticileri, öğretmen sendikalarının genel felsefe, yaklaşım ve eylemlerinde önemli değişimler geçirdiğini iddia etmektedirler. Oysa, eyalet eğitim bürokrasisi ve iş çevreleri gibi eğitimin diğer bazı önemli paydaşları öğretmen sendikalarının duruşları, felsefeleri, kullandıkları temel strateji ve taktikler anlamında çok fazla değişmediklerini öne sürmektedirler. Bu paydaş gurupları öğretmen sendikalarını, Minnesota eyaletinde devlet okullarını iyileştireceği düşünülen ve standartlaşma akımının bir yansıması olan "Öğrenme Profili" (Profile of Learning) gibi çok önemli eğitim reformlarına direnç göstermekle suçlamaktadırlar.

2. 1990'lardan öncesinin öğretmen sendikalarını en iyi tanımladığını düşündükleri mecazlar geliştirmeleri istendiğinde katılımcıların çoğu güç, koruma, tehdit, mücadele ve cesaret sıfatlarını içeren mecazlar kullanmışlardır. Sendika üye ve yöneticileri de dahil en fazla tekrar edilen mecaz yalın güç, control ve katılığı ifade eden "çekiç" mecazıdır. "Çekiç" mecazını niçin kullandıkları sorulduğunda katılımcılar şu tür açıklamalar getirmişlerdir: Genellikle okul ve eğitim yöneticileri ile mücadelede çekiçin sonuç alıcı gücünü kullanmak, sanayi sendikacılığının bir yansıması olarak, istediğimiz bu ve bunu alıncaya kadar savaşacağız, vb. Çekiç mecazına ek olarak, koruma ve acımasız savunmayı ifade eden "anne ayı," düz çizgiler üzerinde hareket eden, tek bir hedefe kilitlenen, yolunda olduğunuza pişman olabileceğiniz bir "su aygırı" öğretmen sendikalarının geçmişteki imajı hakkında en sık dile getirilen diğer ilginç mecazlardır.

3. Toplu sözleşme, maaş ve özlük hakları, üyelerin korunması, sosyal güvenceler ve çalışma koşullarının iyileştirilmesi konularında pazarlık etmek öğretmen sendikalarının geçmişte en sık kullandıkları strateji ve taktikler olarak dile getirilmiştir. Eyalet eğitim bürokratları ve diğer bazı eğitim paydaşları sendikaların bu strateji ve taktikleri hala bugün bile yaygınlıkla kullandıklarını söylemişlerdir.

4. Öğretmen sendikalarının bugün nasıl göründüklerine ilişkin olarak eyalet eğitim bürokratları ve bazı diğer paydaşlar sendikaların geçmişteki imajlarına ilişkin mecazların aynısını kullanmışlardır. Onlara göre, öğretmen sendikaları bugün de geçmişte olduklarından pek farklı değildir. Öte yandan, özellikle sendika üyesi ve yöneticisi olan bazı katılımcılar sendikaların imaj ve eylemlerinde bazı farklılıkların gerçekleştiğine inanmaktadırlar. Dallanan ağaç, çözümler üzerinde çalışan bir takım, işbirliği ve tartışmayı betimleyen bir yuvarlak masa, politika oluşturulmasında söz sahibi olmak isteyen bir oyuncu gibi mecazlar bu değişen imajı tanımlayan mecazlar olarak dile getirilmiştir.

5. Katılımcılara göre, standartlaşma hareketi, charter okulları, devlet okul reformu, eğitimde hızla yükselen hesap verebilirlik hareketi, hizmet öncesi öğretmen yetiştirme uygulamaları, öğretmenlik mesleğine yeni giren insanların getirdiği yeni beklentiler ve değerler sistemi, yeni liberal piyasa paradigmasının kendini artan oranda eğitimde hissettirmesi ve dolayısıyla sendikacılığa egemen olan klasik sosyalist anlayışın sorgulanır hale gelmesi öğretmen sendikalarında gözlenen değişimlere kaynaklık eden etkenlerdir.

6. Öğretmen sendikalarının gelecekte nasıl olacağına ilişkin olarak katılımcılar üç kategori altında mecazlar üretmişlerdir. a) yuvarlak bir masa etrafında toplanmış birlikte düşünen ve birlikte çözen bir profesyoneller gurubu, b) kalite standartlarını belirleyen ve izleyen, daha esnek, daha az hiyerarşik, öğretmenlerin mesleki ve profesyonel gelişmelerini daha öne alan ve aynı zamanda avukat ve doktorların meslek örgütlerine benzeyen bir meslek örgütü, c) yön gösteren ve yol aydınlatan bir deniz feneri.

7. Son olarak, öğretmen sendikalarının yukarıda sözü edilen gelecek imajını gerçekleştirebilmek için bir dizi strateji ve taktik önermişlerdir: öğretmen kalitesine odaklanmak, meslek için gerekli olan profesyonel standartları saptamak, öğretmenlerin mesleki ve profesyonel gelişimleri için önderlik rolü üstlenmek (toplu sözleşmelerin en önemli bileşeni olarak bu konuyu öne almak), sendikaların kurumsal dönüşümü için önderliği üstlenmek, performans dayalı ödeme konusunda standartlar geliştirmek ve yaymak, eğitimin zor süreçlerine dahil olmak, okul ve sınıf düzeylerine daha yakın durmak, daha yatay ve esnek yapılanmış sendika örgütlenme modelleri üzerine odaklanmak.

Sonuç ve öneriler: Genel olarak vurgulamak gerekirse, dört önemli ana başlık öne çıkmaktadır: Öğretmen sendikaları köklerine geri dönmektedirler; öğretmen sendikalarının eğitim ve okul reform çalışmalarında etkili aktörler olduğu genel kabul görmektedir; öğretmen sendikalarının eğitim ve okul reform sürecinde önemine en az inananlar eğitim politikalarının oluşturulmasında en önemli görevi yüklenen politikacılar iken buna en çok inananlar yerel ve okul düzeyine daha yakın olan paydaşlardır; ve son olarak, sendikalar reform sürecinde liderlik rolü üstlenebilmeleri için birden çok ve yeni stratejileri bulma ve uygulama konusunda aktif olmalıdırlar.

Anahtar Sözcükler: Öğretmen sendikaları, yeni sendikacılık, okul/eğitim reformu, mecazlar, değişim etkeni olarak sendikalar.